

REDC



ComReg Survey on Utility Non-Geographic Numbers

March 2023

ComReg Document 23/27a



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1 Background and Sample

Background



Non Geographic Numbers (NGNs) are telephone numbers used by organisations and businesses to provide services (e.g. public services, helplines and banking). Unlike geographic (landline) numbers (e.g. 01 for Dublin or 061 for Limerick), an NGN does not relate to a particular geographic area.

The purpose of this research survey is to inform ComReg about how and when people contact the utility services, namely ESB Networks, Gas Networks Ireland (GNI) and Irish Water, in the event of an emergency situation or where an incident needs to be reported.

The utilities provide phone numbers for the general public to call, including NGNs.

Survey Overview



Survey Objectives

- / To collect evidence regarding people's behaviour and engagement with the utility NGNs.
- / To determine what people know about NGNs; what their experience of using NGNs is; and what their reaction would be to a range of emergency-type scenarios.

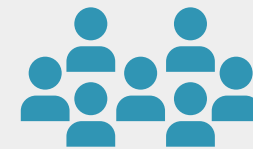
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Quantitative

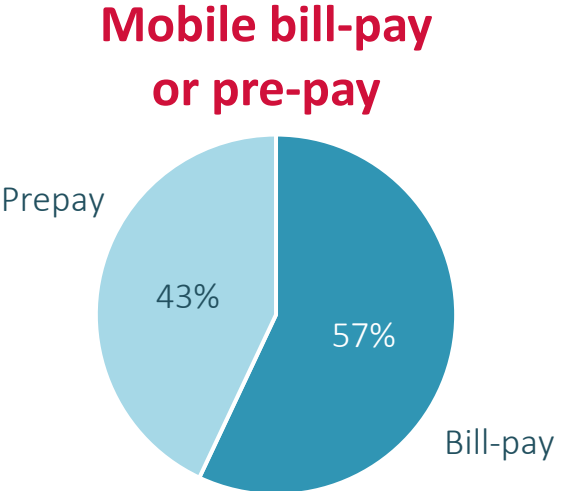
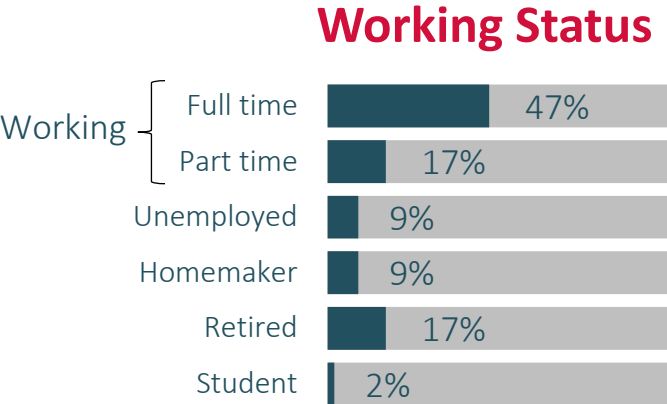
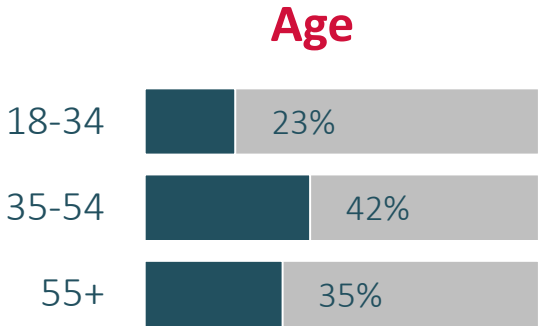
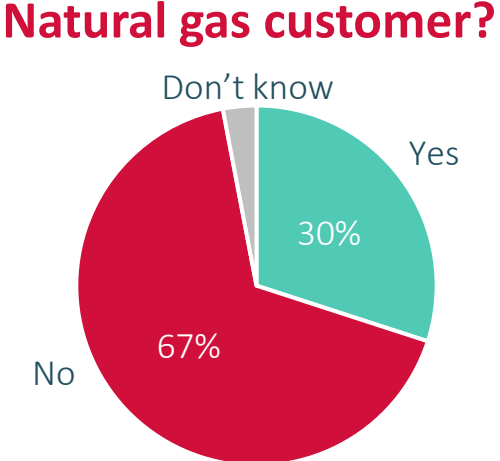
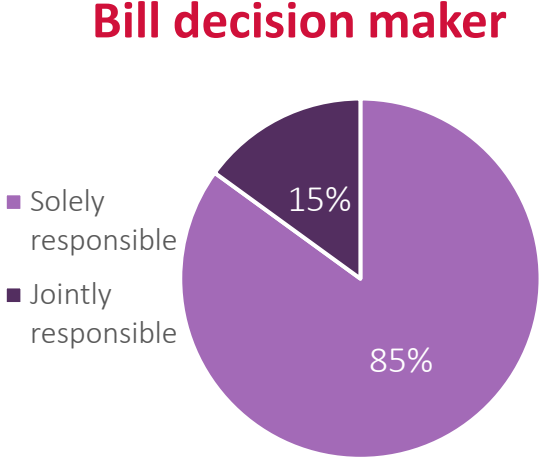
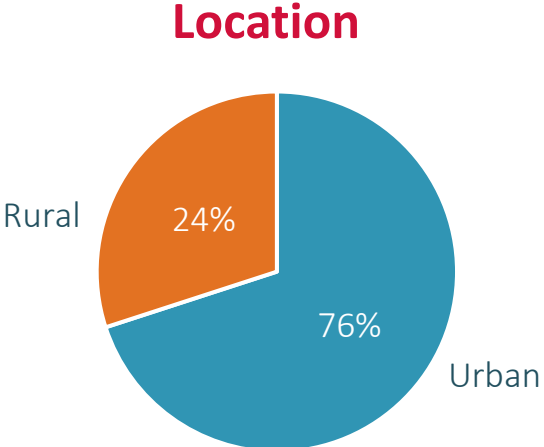
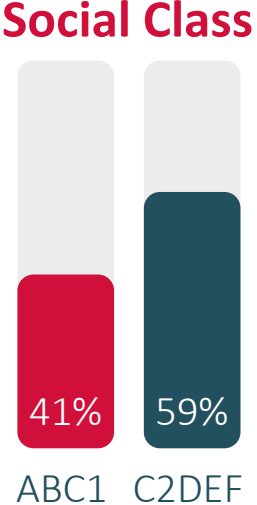
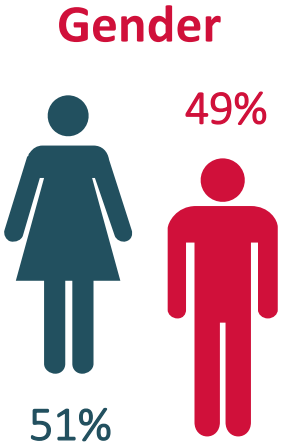
- / Quantitative surveys were conducted online using RED C's online panel RED C Live. RED C Live consists of over 40,000 participants, recruited online and offline.
- / Fieldwork was conducted in October 2022.
- / Quota controls were applied to ensure a representative sample of ROI adults.
- / An initial nationally representative sample of just over 1,000 ROI adults was carried out. A further 300 interviews were carried out among gas customers.
- / Data was weighted back to known proportions to achieve a final nationally representative sample of 1,307 ROI adults in line with the latest CSO projections.

Qualitative

- / Four focus groups conducted in December 2022. Three online and one face to face.
- / Groups were recruited from a broad spread of the population and included those mainly/jointly responsible for household bills. Groups included those with a range of technical abilities.
- / Topics for qualitative review were determined from analysing the quantitative survey responses and are intended to be used to complement the survey results.
- / Where qualitative slides are shown the following images are used.



Quantitative Sample Profile – All Household Decision Makers



Qualitative Sample Profile – All Household Decision Makers



Focus Group Structure

Group	Gender	Age	Gas Supply*	Social Class	Tenure	Area	Mode	Date
1	Male/Female	65+	Some	BC1C2	Renter/Home Owner	Cork	Online	6 th Dec 5.30pm
2	Male/Female	35-49	All	ABC1	Home Owner	Dublin	Online	8 th Dec 7.30pm
3	Male/Female	50-64	Some	C2DE	Council/Social Housing	Athlone	Online	8 th Dec 5.30pm
4	Male/Female	70+	All	BC1C2	Home Owner	Dublin	Face to Face	13 th Dec 3.30pm

- / Within each group four scenarios were reviewed across gas, electricity and water, covering potential incidents both outside and in the home.
- / A face to face focus group was commissioned in order to explore any differences in behaviour across age groups, and to further examine the likely behaviours of older cohorts when faced with utility related incidents.

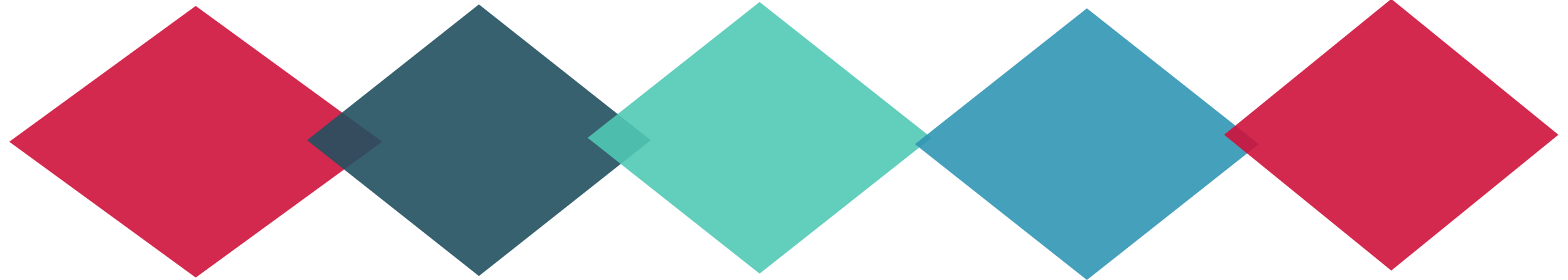


2 Key Insight

Main findings of qualitative research



Reaction to in home and out of home potential emergencies were tested for gas, electricity and water. The findings were fairly consistent across age groups and demographics. The following common behavioural responses were uncovered...



Situation Dependent

Reactions depended on the location of incident, which utility was involved and who else was present. Responses varied from non reporting to being taken very seriously and reported with high persistence.

In Home v. Out of Home

In Home scenarios were generally perceived to be more important and were more likely to be 'followed through on' and be reported. The exception to this is electricity out of home incidences.

Online search

Google search was the main means of finding a number. The preference, and need, to speak to a person to report a potential emergency was also high. Seeking an in-person response was the first inclination of most participants.

Limited reliance on print

Limited use of printed materials such as stickers and leaflets to find a number – even among older cohorts.

Reluctance to approach physical assets

Most respondents would be reluctant to approach a physical asset to look for a number to call – being concerned about personal safety. Also reported that they would assume the number was outdated, or wouldn't be easy to see.

Gas – Key Findings

- 1** In the quantitative research people commonly indicated they would call GNI in the event of a gas emergency. From the qualitative work we found that people would call GNI and are likely to google terms such as ‘gas emergency’ or ‘gas leak’ in the first instance to find the organisation and number to call. In both cases, some indicated they would call 999, but this course of action was more common when a gas emergency was outside versus in the home.
- 2** While a utility bill would be used by a portion of people included the survey, the vast majority of focus group participants qualitatively report the ease of googling a number to call versus looking for a utility bill. Participants reported a lack of knowledge around what would constitute a ‘gas physical asset’ and where one was hypothetically present that they would be very reluctant to approach in search of a number – due to personal safety concerns.
- 3** Persistence in reporting an incident is in part determined by the context of the emergency. Where a serious incident needs to be reported people are very likely to continue to attempt to report e.g. through seeking an alternative number (if they could not get through) via googling ‘smell of gas on street’ or by dialling 999. Focus groups highlighted a high level of awareness of the GNI television ad, and the procedures to follow when there is a smell of gas.
- 4** Reporting a gas incident is seen as important and something people would take seriously. Strong preference to ‘speak to someone’ when reporting an incident [across quantitative survey and focus group]. Some claim they may not report a gas incident out of home as the context/situation may negate the need to report e.g. a busy area or an area they are unfamiliar with.

Electricity – Key Findings

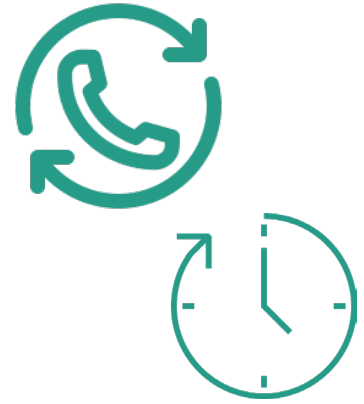
- 1** Seen as very important to report an incident involving electricity outside the home. A fallen pole or wire is visual proof of a problem (e.g. in contrast to a smell of gas). Strong sense of responsibility to report an electricity related incident and protect other members of the public.
- 2** High degree of awareness of ESB as the organisation to report to, but the number to call is generally not known. Where a number is needed it is most likely to be found via Google. 12% of Participants indicated they would call 999, but this is more common for out of home incidents – in order to escalate the emergency and ensure a resolution is found.
- 3** When a utility supplier needs to be called, people won't waste time re-dialling a number that doesn't get through. Many reported their next course of action would be to call 999 or Google the number. Little evidence in the focus groups of printed material/assets/bills being used to find a number for a utility. High degree of hesitation reported in terms of approaching anything electrical outside of the home to establish what number to call.
- 4** In home some people feel empowered to manage an electrical incident by shutting off the power at the fuse box, but others were concerned about touching anything. People were unlikely to have a sticker showing an emergency number placed on a fuse box.

Water – Key Findings

- 1** A water incident outside the home was the least likely scenario to be reported to the authorities – generally perceived as ‘less of an emergency’ than a gas or electricity incident. Where an incident is reported, people are most likely to call Irish Water or the local council. Not seen as a life-threatening event and was not treated with the same sense of urgency as a gas or electrical emergency. Water emergencies may go unreported outside the home as people often assume someone else might report the emergency.
- 2** Within the home, many people assume they would be responsible themselves for a water emergency. Some will shut off the water supply and/or call a plumber. Where it was deemed relevant to contact a utility, Irish Water was considered but the phone number for Irish Water is largely unknown. Not the same awareness of advertising for water emergencies as that for gas and electricity.
- 3** Google was widely indicated as being used to look up a contact number for Irish Water. Little evidence of reliance on forms of printed material.

Persistence in reporting

Initial quantitative research indicated a level of persistence in reporting an incident. Given a smaller achieved base at these questions in the quantitative survey we sought to understand at a deeper level motivation and behaviour around reporting from a qualitative perspective.



Across groups we found that people wouldn't dial more than once or twice, after which the majority would then resort to calling 999 to report the incident or google the number for the relevant emergency/utility to get an alternative contact number for the utility in question.



If I couldn't get through my default would be to ring 999 [GAS outside the home; 65+]



Would be proactive – wouldn't just leave it to someone else to report [GAS outside the home; 75+]

3a

Gas incidents in the home



Initial reaction to gas incident in home



Stabilise the potential emergency

Some report to turning off gas supply, opening windows, standing outside the home [as per GNI ad] while others report getting out of house as soon as possible and would be unsure how to turn off the gas supply or even to feel comfortable doing this.



Who to call

Many do not think of GNI first. Once prompted, there is some recollection of GNI.

Some confusion between role of GNI and Bord Gáis.

Very limited number have GNI number saved in phone or written down to call in event of emergency.

Some are likely to call 999 – either initially or if unable to get through to utility.



Online search

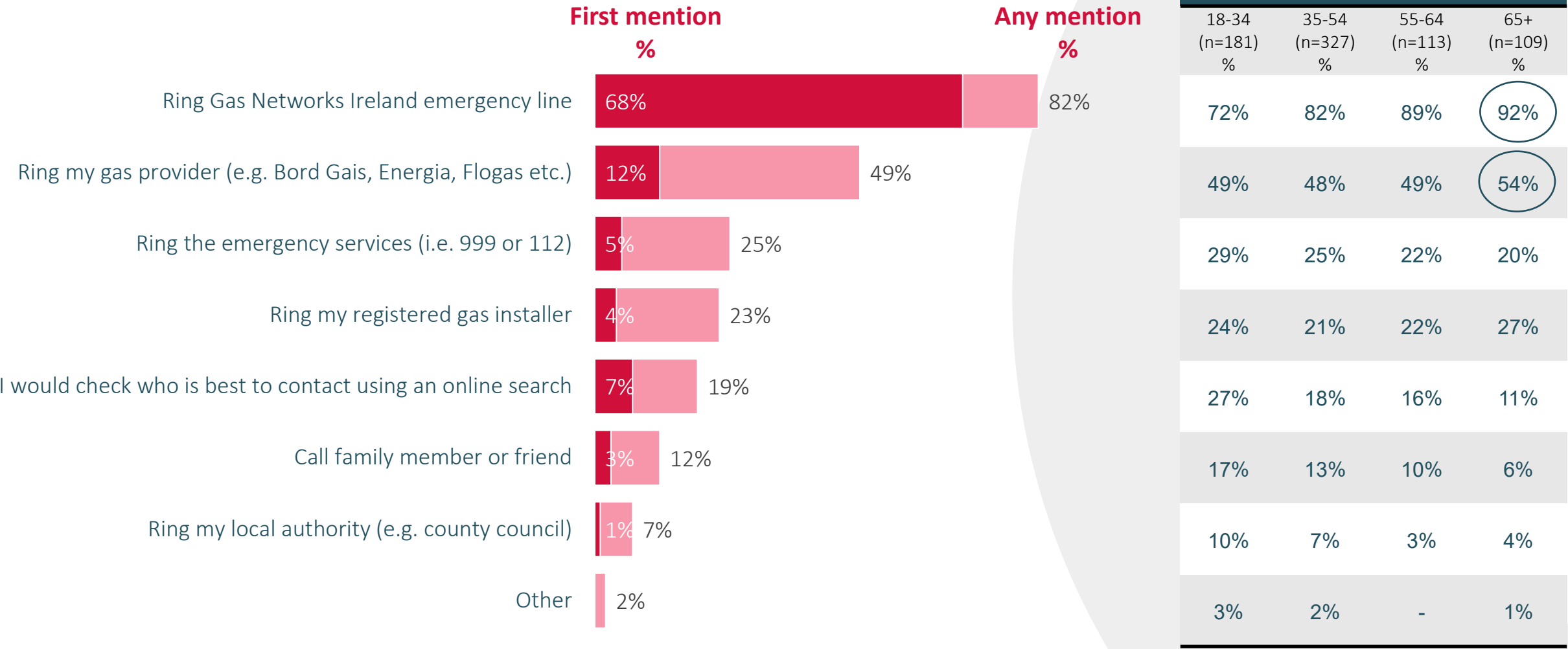
With the confusion between GNI and Bord Gáis many likely to google – ‘gas emergency help line’ ‘gas leak in home’ ‘smell of gas in house’ and call whatever number they are directed to.

A small minority would go to gas meter to look for a number to call, however are still likely to google the number.

Who would you report an incident involving gas in the home to?



82% mention GNI as the contact they would ring for a gas incident in the home. 68% would contact GNI first.

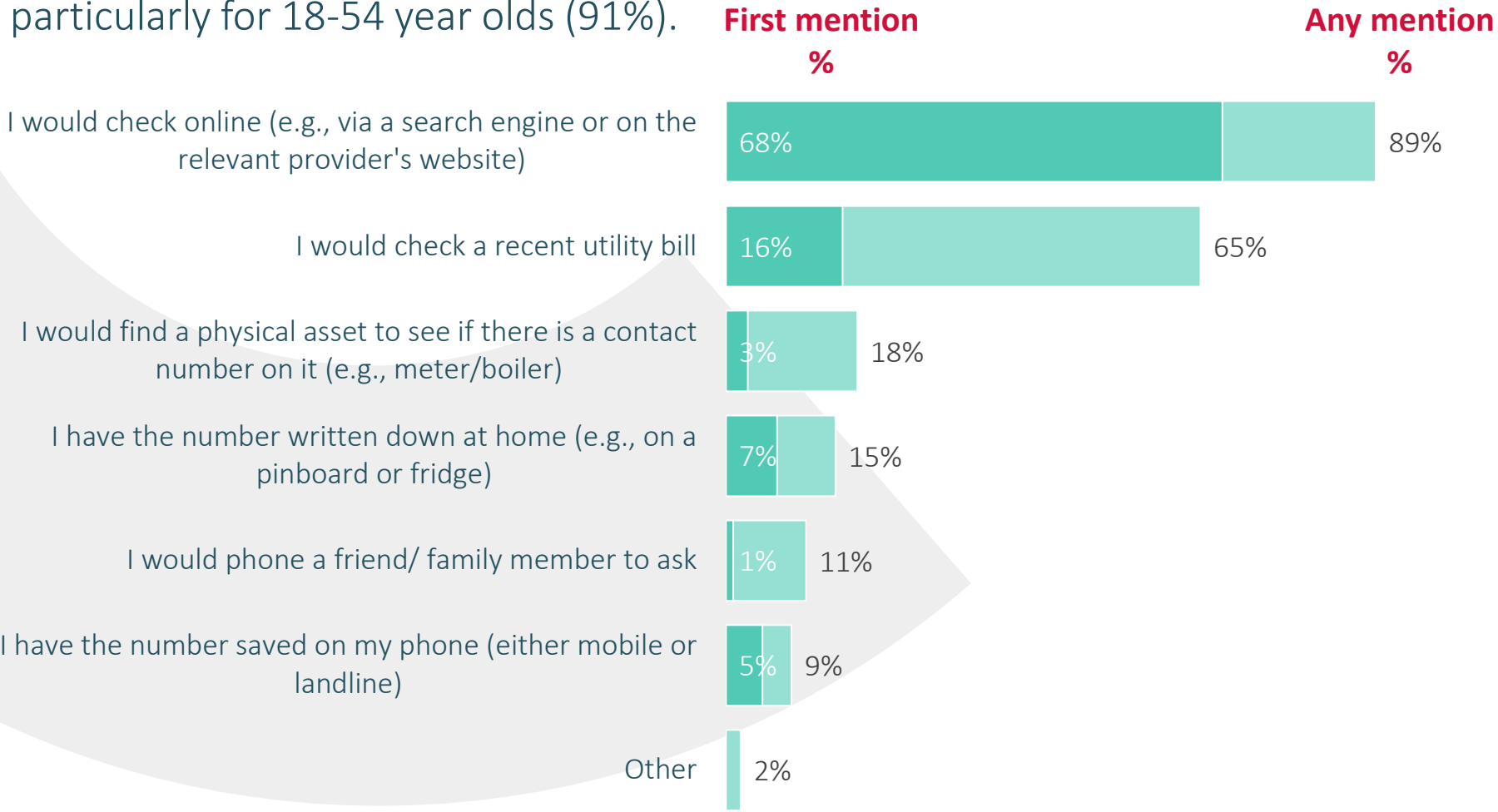


Q.12 In the event that you thought it necessary to report an incident involving gas in your home (e.g. because you smelt gas or otherwise), who would you contact first? Who else, if anyone, would you contact?
 (Base: All gas customers, n=730)

For gas incident in the home, how would you find the appropriate number for GNI?



Checking online is the most common means to find number for GNI (89%), particularly for 18-54 year olds (91%).



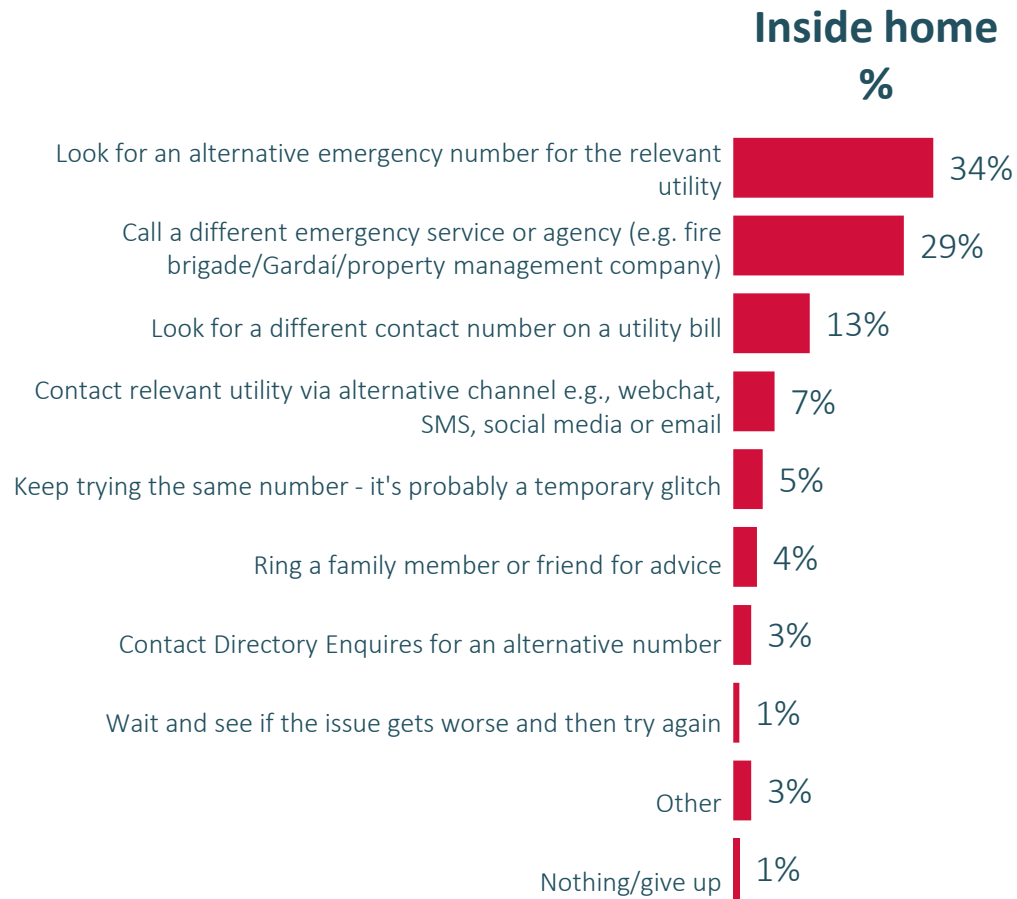
	Age			
	18-34 (n=129) %	35-54 (n=266) %	55-64 (n=100) %	65+ (n=100) %
I would check online (e.g., via a search engine or on the relevant provider's website)	91%	91%	86%	81%
I would check a recent utility bill	59%	64%	70%	68%
I would find a physical asset to see if there is a contact number on it (e.g., meter/boiler)	25%	17%	20%	8%
I have the number written down at home (e.g., on a pinboard or fridge)	9%	12%	20%	25%
I would phone a friend/ family member to ask	11%	12%	9%	9%
I have the number saved on my phone (either mobile or landline)	10%	8%	9%	10%
Other	1%	1%	2%	3%

Q.15 How would you most likely find the appropriate phone number to contact Gas Networks Ireland? How else are you likely to find this number?
 (Base: All who would call GNI in case of incident in the home, n=595)

Likely action if could not get through to gas utility



For a gas incident at home, 34% would look for an alternative number for the relevant utility and 29% would call a different emergency service or agency if they couldn't get through to the utility on a particular contact number



Age			
18-34 (n=181) %	35-54 (n=327) %	55-64 (n=113) %	65+ (n=109) %
34%	36%	30%	31%
25%	31%	32%	29%
13%	12%	15%	13%
8%	7%	7%	9%
5%	5%	5%	6%
6%	5%	3%	2%
5%	2%	3%	5%
1%	1%	1%	-
2%	1%	4%	6%
1%	1%	1%	-

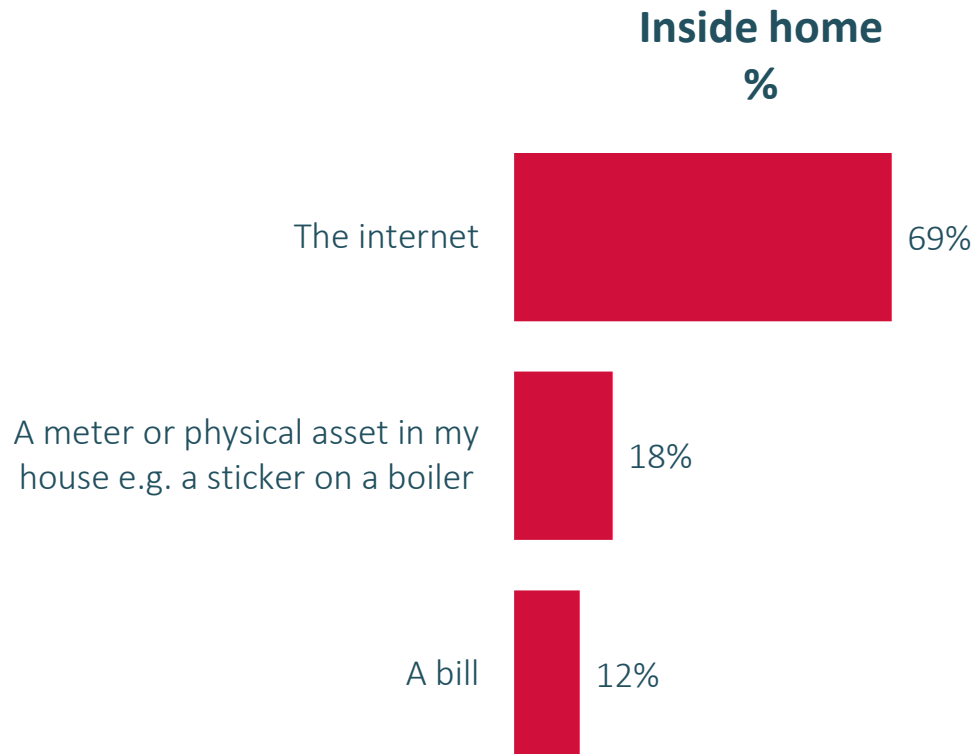


Q.16 In the event of an incident involving gas in your home where you could not get through to the utility provider using a particular contact number and there is no recorded message, instructing you on an alternative number to call, what would you do?
(Base: All gas customers, n=730)

Where would you look for an alternative number to call regarding a gas incident in the home?



69% would look for an alternative number for the gas utility on the internet. Using the internet is particularly prevalent for those aged 18-54.



Age		
18-34 (n=61) %	35-54 (n=116) %	55+ (n=69) %
78%	79%	45%
12%	13%	31%
7%	8%	23%

Persistence in reporting



From the qualitative research, most people would not re-dial more than once and, if they couldn't get through to the utility, would either ring 999 or google the number. From the quantitative results, people reported being very persistent in reporting the incident. 46% would re-dial less than three times and 81% would only wait a few minutes between calls for a gas incident in the home*.

Behaviours noted from qualitative research

- Single most common response across age groups was to google the number/utility to call.
- Strong sense of urgency to get the incident reported. Speaking to somebody was deemed very important in comparison to reporting an incident via any other means e.g. webchat or email.
- If people couldn't get through to utility number, would quickly call 999 – time of the essence. Most would not re-dial a number that didn't work more than once – would either google for an alternative number or call 999.
- Very few would go searching for a number on a leaflet/bill, sticker, or a gas meter. Very few have a pre saved number for a utility supplier in their mobile phone or written down somewhere.
- Some limited recall of “Winter Ready” brochure, which was kept in a safe place and referred to for emergency numbers.



I would google straight away – no time to waste calling into a neighbour and if there was no answer on the phone I would just call 999.

3b

Gas incidents
outside the home



Initial reaction to gas incident out of home



Access the situation

Reactions vary depending on where the gas smell is – inside a building, outside on street, in a busy area or not, near home or not. Generally, in home incidences seen to be more important to follow up on. Potentially need to check with somebody else as gas is not something that can be seen.



Who to call

Likely to have a mobile phone with them and will use Google to search for an emergency contact. Search terms include 'gas leak in area', 'smell of gas on street'.

High recall of advertising in relation to this situation but limited awareness of company to call or their number. Some confusion between reporting to GNI versus Bord Gáis.



Reporting

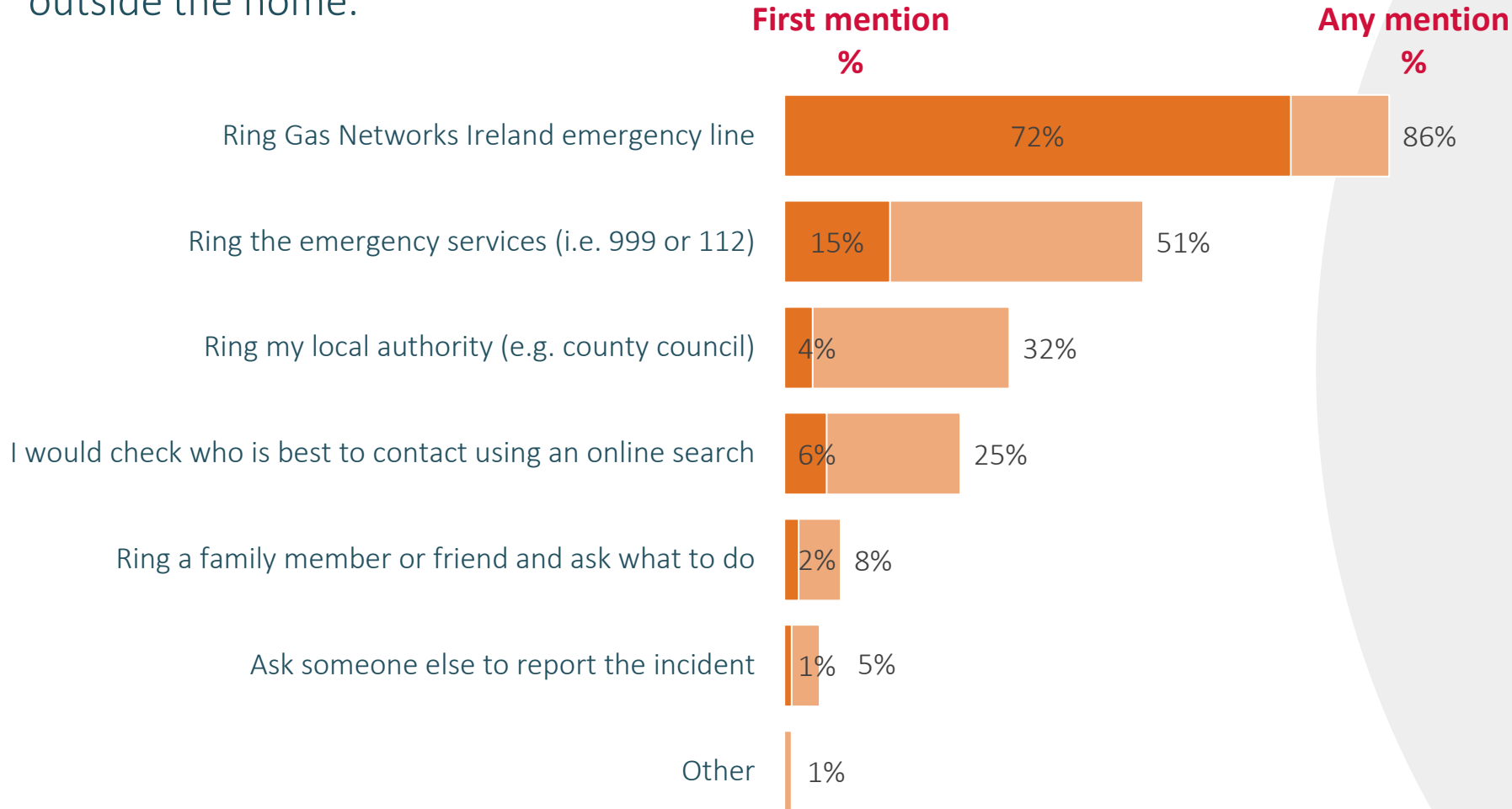
Some mention they would not report an incident that did not seem serious and was in a busy area.

Some awareness of importance of reporting gas incidents. Preference to 'speak to someone' when reporting an incident.

Who would you report an incident involving gas outside the home to?



86% of all adults would call the GNI emergency line to report a gas incident outside the home.

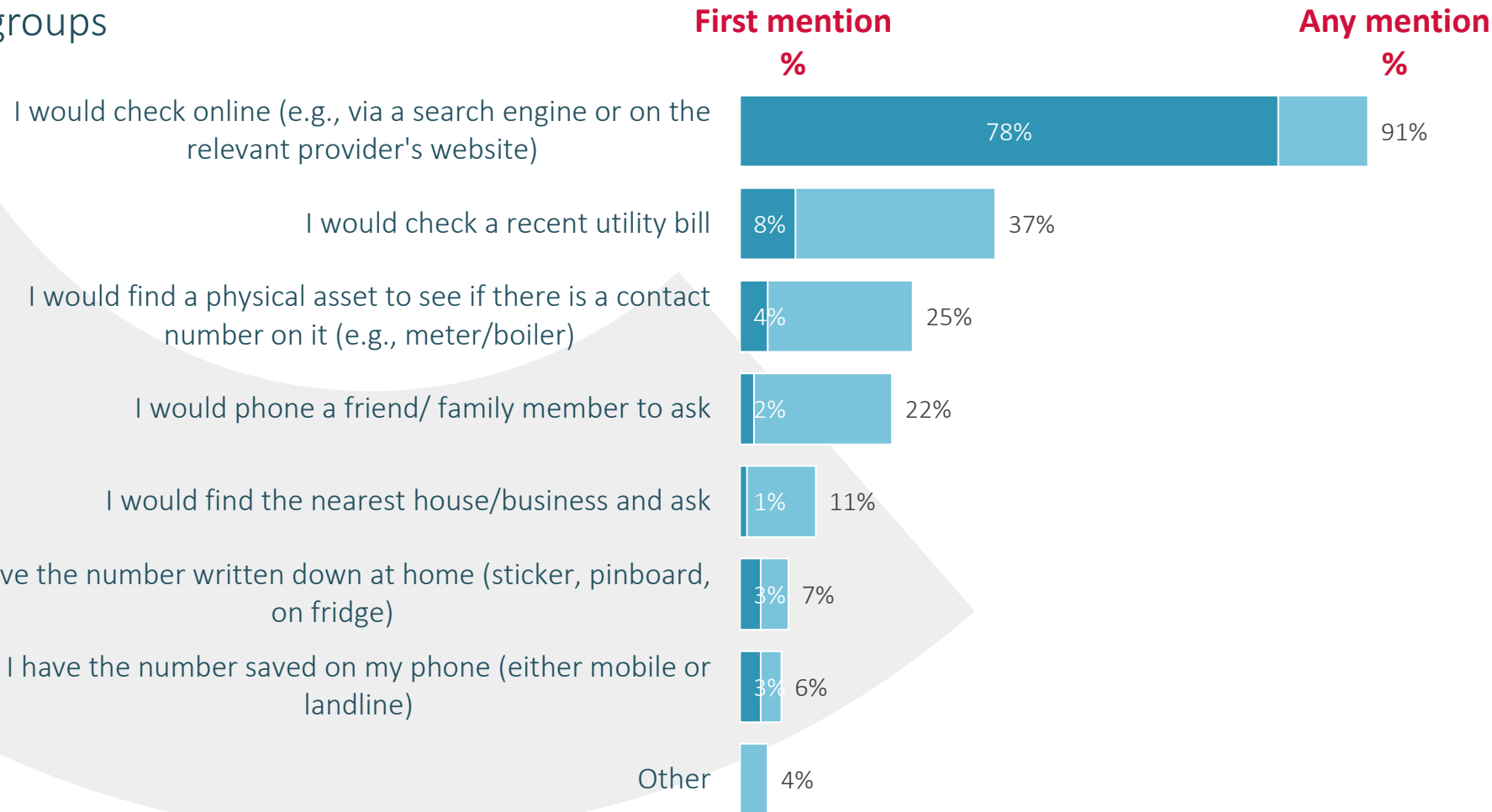


Age			
18-34 (n=321) %	35-54 (n=543) %	55-64 (n=200) %	65+ (n=243) %
81%	86%	87%	90%
43%	50%	53%	62%
32%	30%	33%	34%
31%	27%	23%	16%
15%	8%	4%	2%
5%	4%	2%	6%
0%	1%	0%	1%

Q.18 In the event that you thought it necessary to report an incident involving gas away from your home (e.g. because you smelt gas on a street), who would you contact first? Who else (if anyone) would you contact?
(Base: All household decision makers, n=1307)

For gas incident outside the home, how would you find the appropriate number for GNI?

91% would check online for GNI's number. There are similar results across age groups



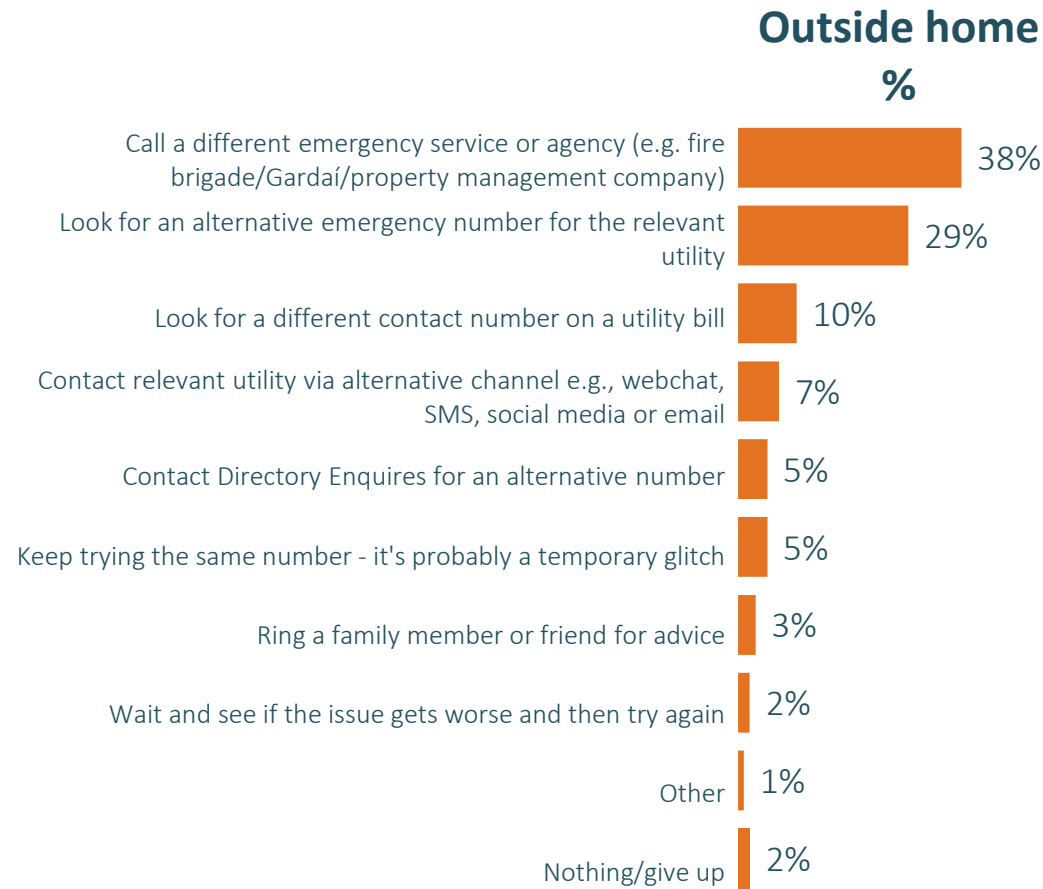
Age			
18-34 (n=258) %	35-54 (n=465) %	55-64 (n=176) %	65+ (n=220) %
91%	92%	90%	90%
41%	38%	35%	32%
26%	25%	25%	24%
22%	21%	23%	22%
8%	11%	12%	12%
5%	7%	7%	8%
5%	7%	5%	6%
1%	3%	5%	7%

Q.21 How would you most likely find the appropriate phone number to contact Gas Networks Ireland? How else are you likely to find this number? (Base: All who would call GNI in case of incident outside the home, n=1119)

Likely action if could not get through to gas utility



For a gas incident outside the home, 38% would call a different emergency service or agency if they couldn't get through to the utility on a particular contact number

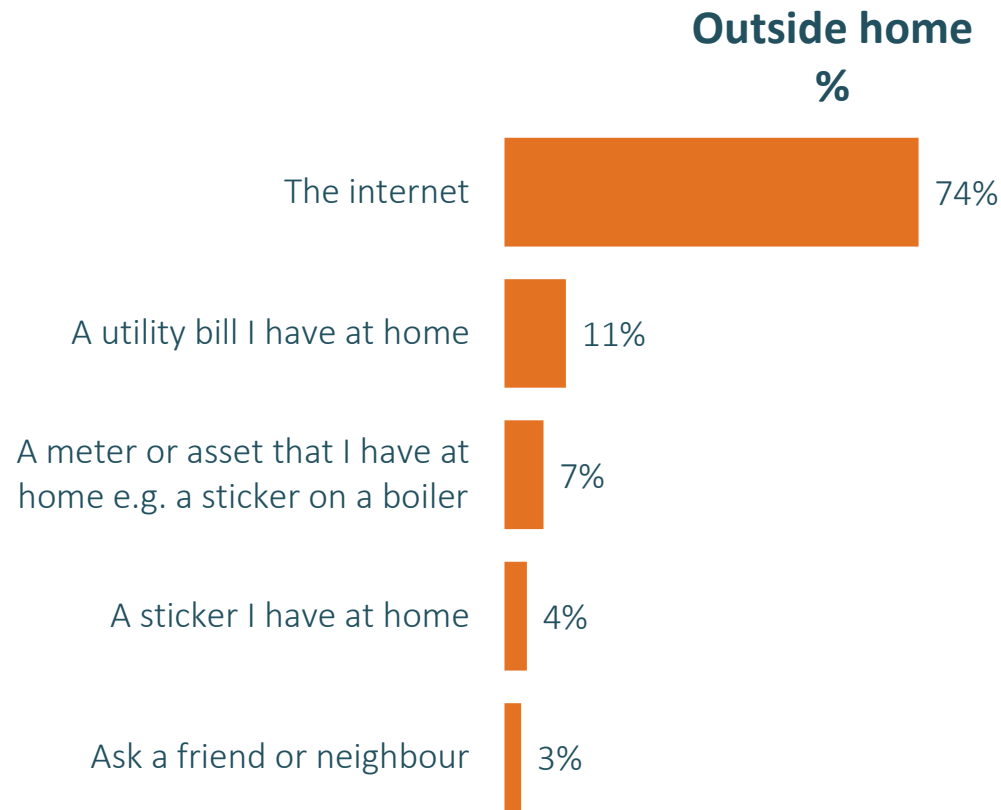


Age			
18-34 (n=181) %	35-54 (n=327) %	55-64 (n=113) %	65+ (n=109) %
34%	35%	47%	44%
32%	32%	24%	18%
8%	10%	12%	10%
5%	7%	5%	11%
6%	5%	4%	7%
4%	5%	4%	5%
5%	3%	2%	1%
3%	2%	1%	1%
1%	1%	1%	1%
2%	1%	2%	1%

Where would you look for an alternative number to call regarding a gas incident outside the home?



74% would look for an alternative number for the gas utility on the internet .



Age		
18-34 (n=58) %	35-54 (n=107) %	55+ (n=49) %
68%	83%	60%
13%	6%	21%
5%	6%	13%
10%	2%	3%
5%	3%	2%



Q23a. Where would you look for an alternative number to call the utility provider regarding the gas incident?
(Base: All who would look for an alternative emergency number for a gas incident outside the home, n = 214)

Persistence in reporting

50% would re-dial less than three times and 77% would only wait a few minutes between calls for a gas incident outside the home*.



Behaviours noted from qualitative research

- An assessment of the gas leak will be made and a judgement on where to **report or not**. More likely to report if in local area, or where there are not many other people in the vicinity.
- Google search used to find number - similar to at home scenario.
- Where there is a need to report an incident, there is a strong sense of **civic duty**.
- The urgency to report is not the same as at home – with small minority opting to report later that day.
- Less likely to spend a lot of effort reporting especially if incident is not serious. More likely to call 999 in public/common area.
- Reluctance to approach physical assets over personal safety concerns.



I would be unlikely to spend a lot of time looking for the right number to call and probably more likely to default to emergency services if unsure about what number to call.



If the situation was serious, I would definitely report it and would feel like when I spoke to a person and log a call that I couldn't do anymore.

4a

Electricity incidents in the home



Initial reaction to electricity incident in the home



Access the situation

Many feel an incident involving electricity in the home can be managed via the fuse box and turning the supply off.

However not all would feel comfortable doing this.



Who to call

An incident involving electricity in the home is often assumed to be the responsibility of the homeowner and therefore people think of calling an electrician. For more serious incidents people think of ESB – but there is some confusion between ESB and ESB Networks.



Reporting

Need to report an incident by speaking to somebody.

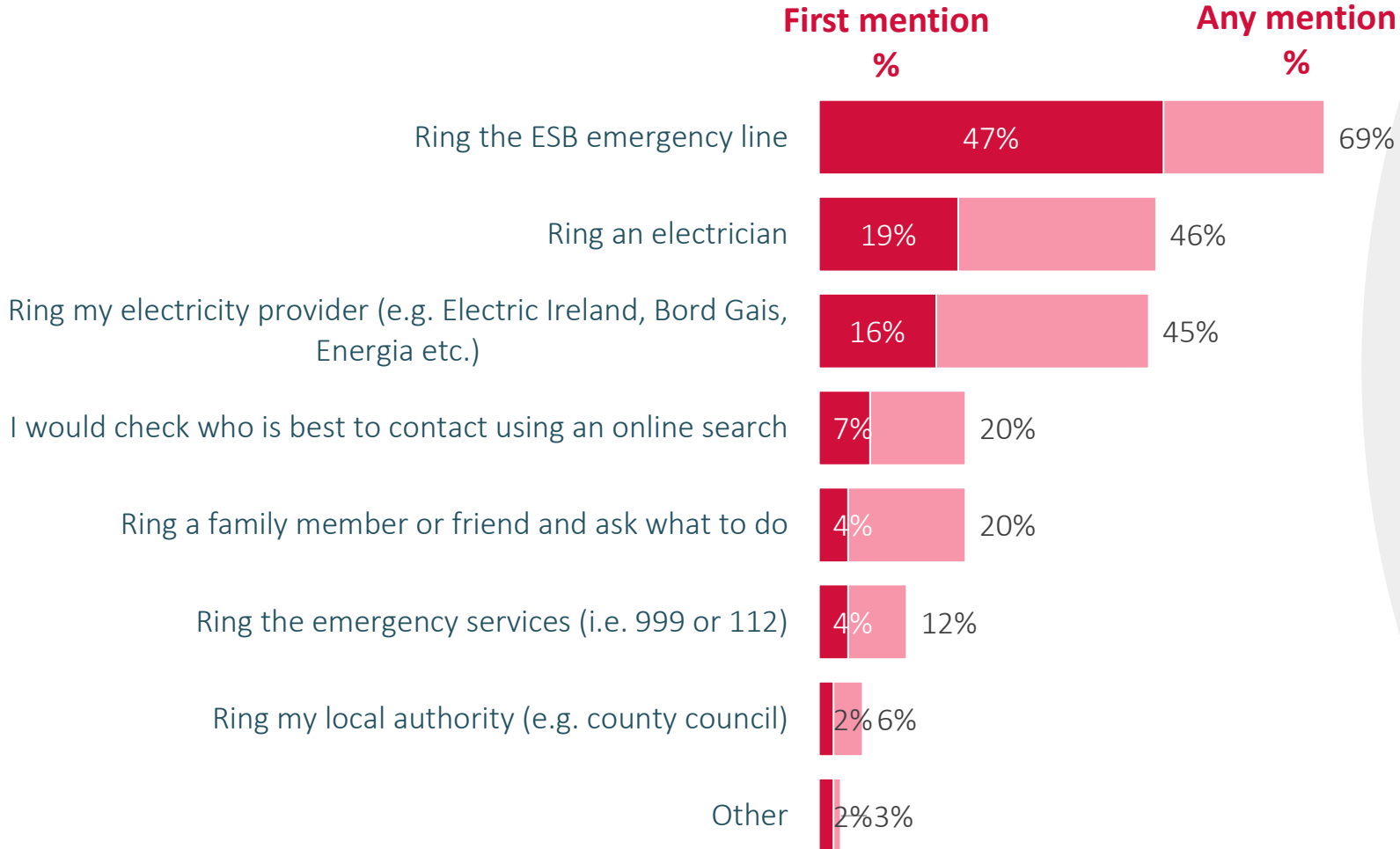
Many have phone numbers for electricians saved in phone or will ask for a number in a WhatsApp group.

Google most commonly used to find utility numbers.

Who would you report an incident involving electricity in the home to?



In the event of an electricity incident in the home, 69% would call the ESB emergency line and 46% would call an electrician.



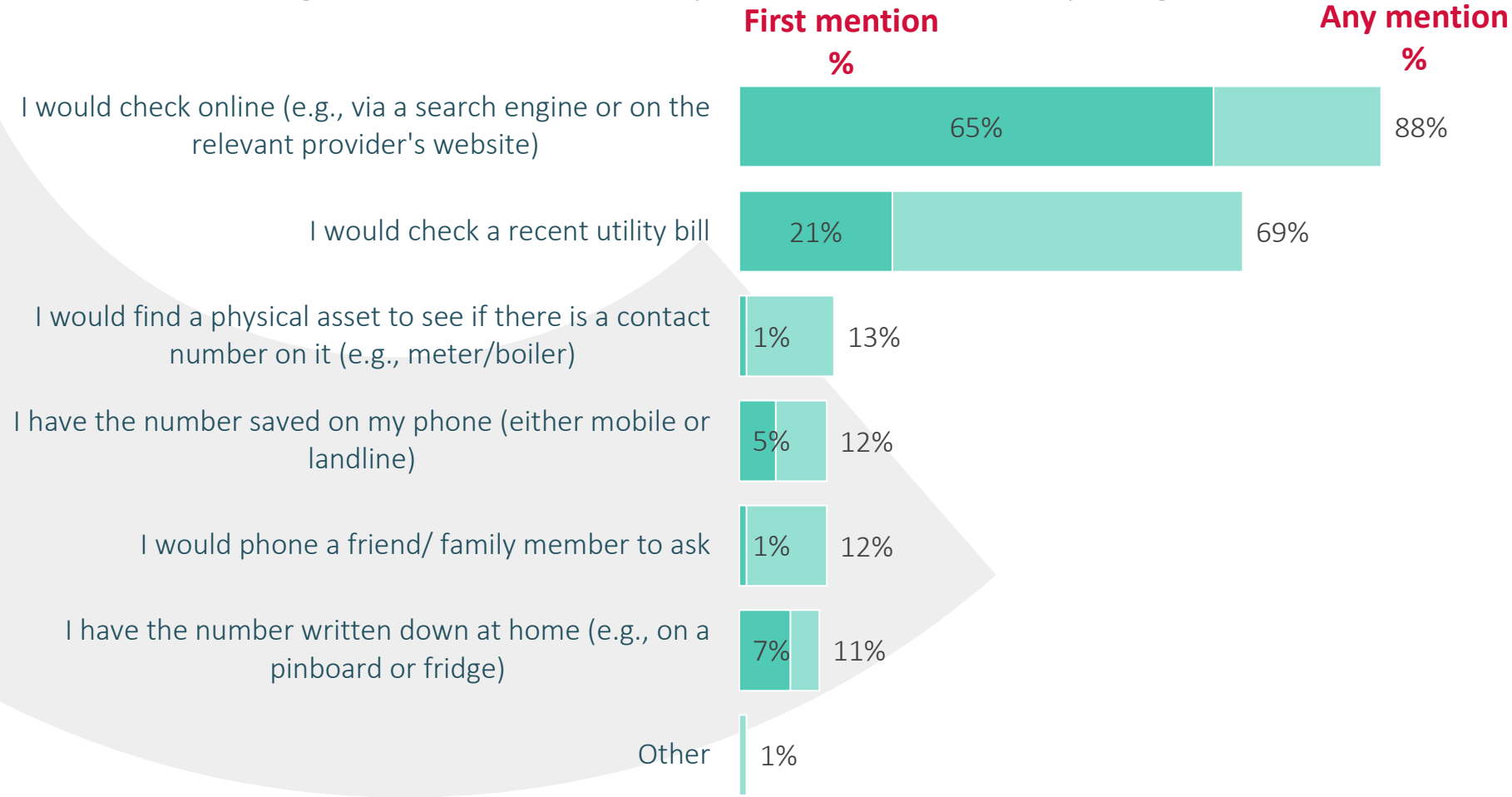
Age			
18-34 (n=321) %	35-54 (n=543) %	55-64 (n=200) %	65+ (n=243) %
59%	69%	71%	77%
41%	48%	43%	50%
44%	45%	48%	46%
29%	21%	13%	13%
29%	18%	22%	11%
14%	13%	11%	8%
6%	7%	6%	4%
3%	3%	2%	2%

Q.14 In the event that you thought it necessary to report an incident involving electricity in your home, who would you contact first? Who else, if anyone, would you contact?
(Base: All household decision makers, n=1307)



For electricity incident in the home, how would you find the appropriate number for ESB?

88% would check online for the number. 18-54 year olds are most likely to check online. Those aged 65+ are more likely to check a bill than younger cohorts.



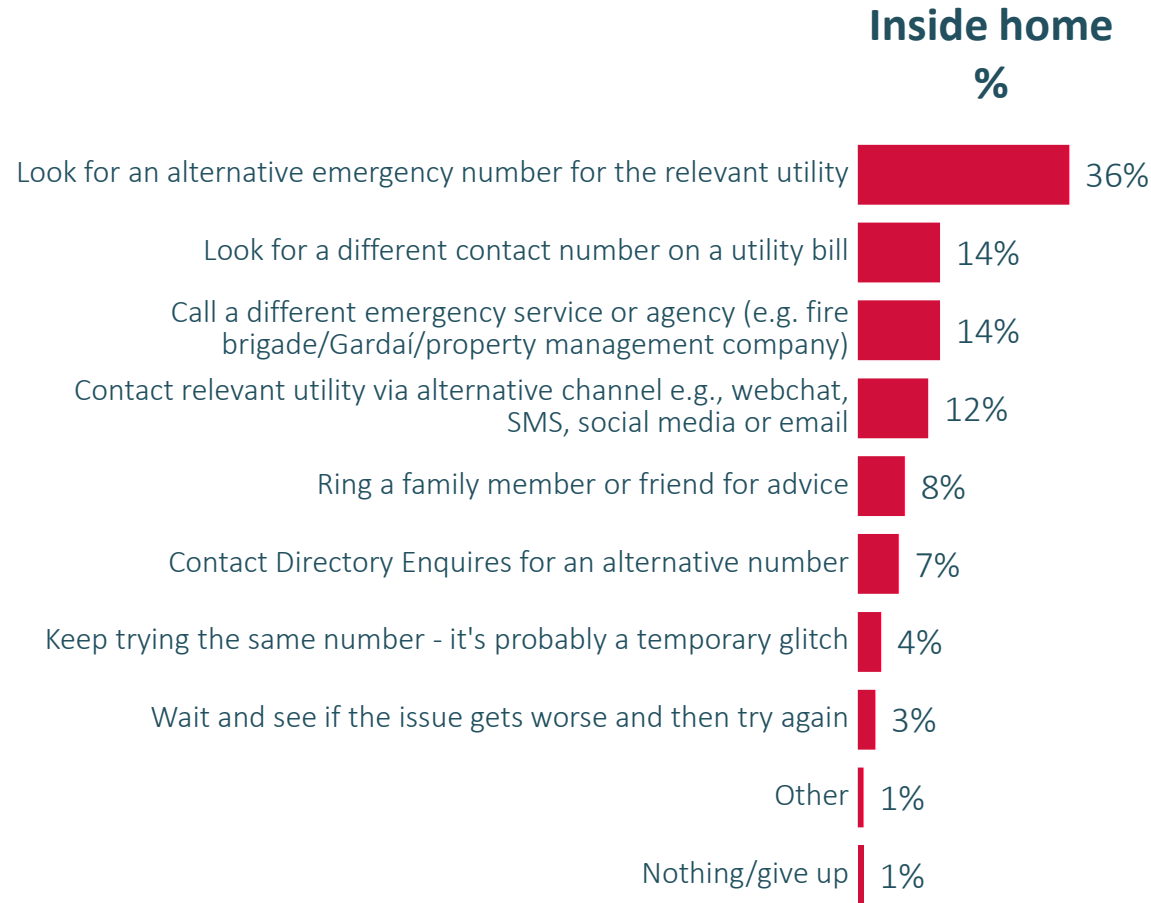
Age			
18-34 (n=189) %	35-54 (n=387) %	55-64 (n=141) %	65+ (n=187) %
93%	92%	84%	78%
66%	65%	70%	81%
18%	16%	9%	7%
14%	13%	8%	13%
10%	10%	14%	15%
3%	9%	16%	17%
1%	1%	1%	0%

Q.15 How would you most likely find the appropriate phone number to contact ESB? How else are you likely to find this number? (Base: All who would call ESB in case of incident in the home, n=904)

Likely action if could not get through to electricity utility



For an electricity incident in the home, 36% would look for a different emergency number if they cannot get through to the utility on a particular contact number.



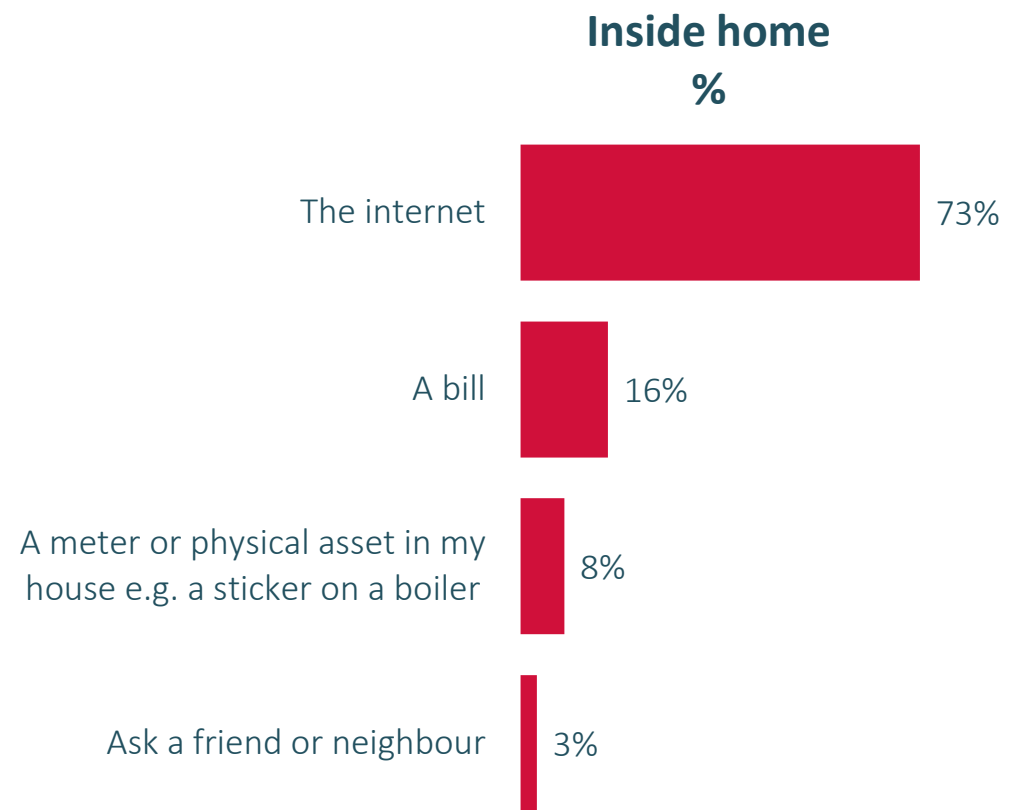
Age			
18-34 (n=321) %	35-54 (n=543) %	55-64 (n=200) %	65+ (n=243) %
34%	38%	40%	31%
13%	11%	16%	19%
14%	15%	11%	12%
11%	14%	9%	11%
10%	8%	8%	6%
7%	6%	9%	7%
4%	4%	5%	5%
3%	3%	3%	4%
3%	*	*	3%
1%	1%	-	2%

Q.16 In the event of an incident involving electricity in your home where you could not get through to the utility provider using a particular contact number and there is no recorded message, instructing you on an alternative number to call, what would you do?
(Base: All household decision makers, n=1307)

Where would you look for an alternative number to call regarding an electricity incident in the home?



73% would look online for an alternative number. 29% of those aged 55+ would check a utility bill.



Age		
18-34 (n=61) %	35-54 (n=116) %	55+ (n=69) %
78%	79%	62%
11%	9%	29%
7%	9%	7%
3%	3%	2%



Q17a. Where would you look for an alternative number to call regarding the electricity incident?
(Base: All who would look for an alternative emergency number during an electricity incident inside the home, n=246)

Persistence in reporting

38% would re-dial less than three times and 64% would only wait a few minutes between calls for an electricity incident inside the home*.



Behaviours noted from qualitative research

- Turning off the electric supply into the house gives people time to think about who to call. **Less of a panic situation** than for gas incident in the home.
- Strong preference to speak to a person to log an incident. **Not seen as an option to leave the incident unreported.**
- If the incident is assumed to be caused by supply in the house, preference amongst most is to call an electrician, rather than ESB.
- Strong reliance on a google search to find a utility number – likely to search ‘ESB emergency’.



You kind of think what goes on inside the walls of my house is my responsibility and I would need to pay an electrician to sort out the problem.



I think my parents had emergency numbers by the phone when we were growing up but people just google numbers these days.

4b

Electricity incidents outside the home



Initial reaction to electricity incident out of the home



Access the situation

Falling poles & wires seen to be a danger to life and if encountered, would be treated seriously and with care for other members of the public.

Those reporting likely to wait on scene until emergency responders arrive.



Who to call

Respondents most likely to say they will call ESB but not specifically ESB Networks.

Also seen as appropriate to call 999 if the situation is serious.



Reporting

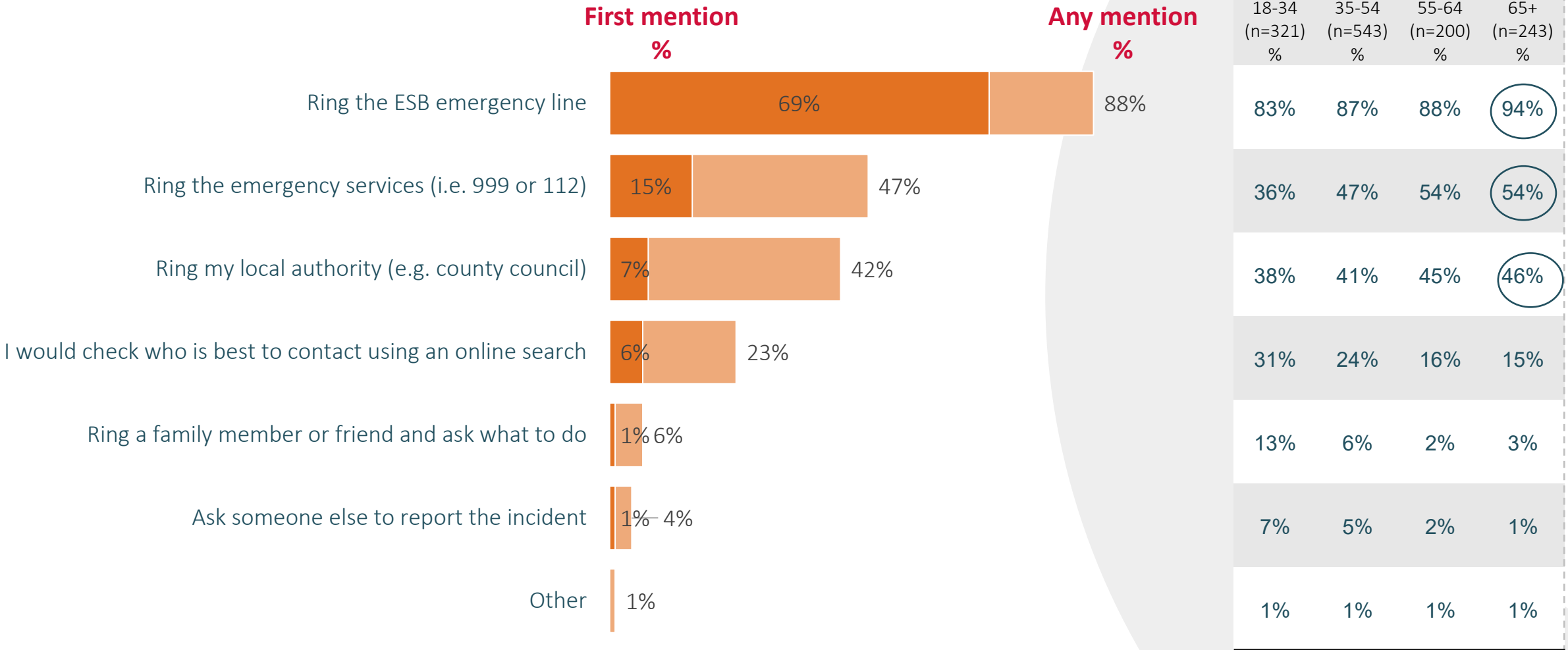
When calling ESB, number unknown by the majority and Google used to search for number.

Have to speak to a person to know the incident is logged and being acted upon.

Who would you report an incident involving electricity outside the home to?



88% would call the ESB emergency line. 47% are likely to call 999.

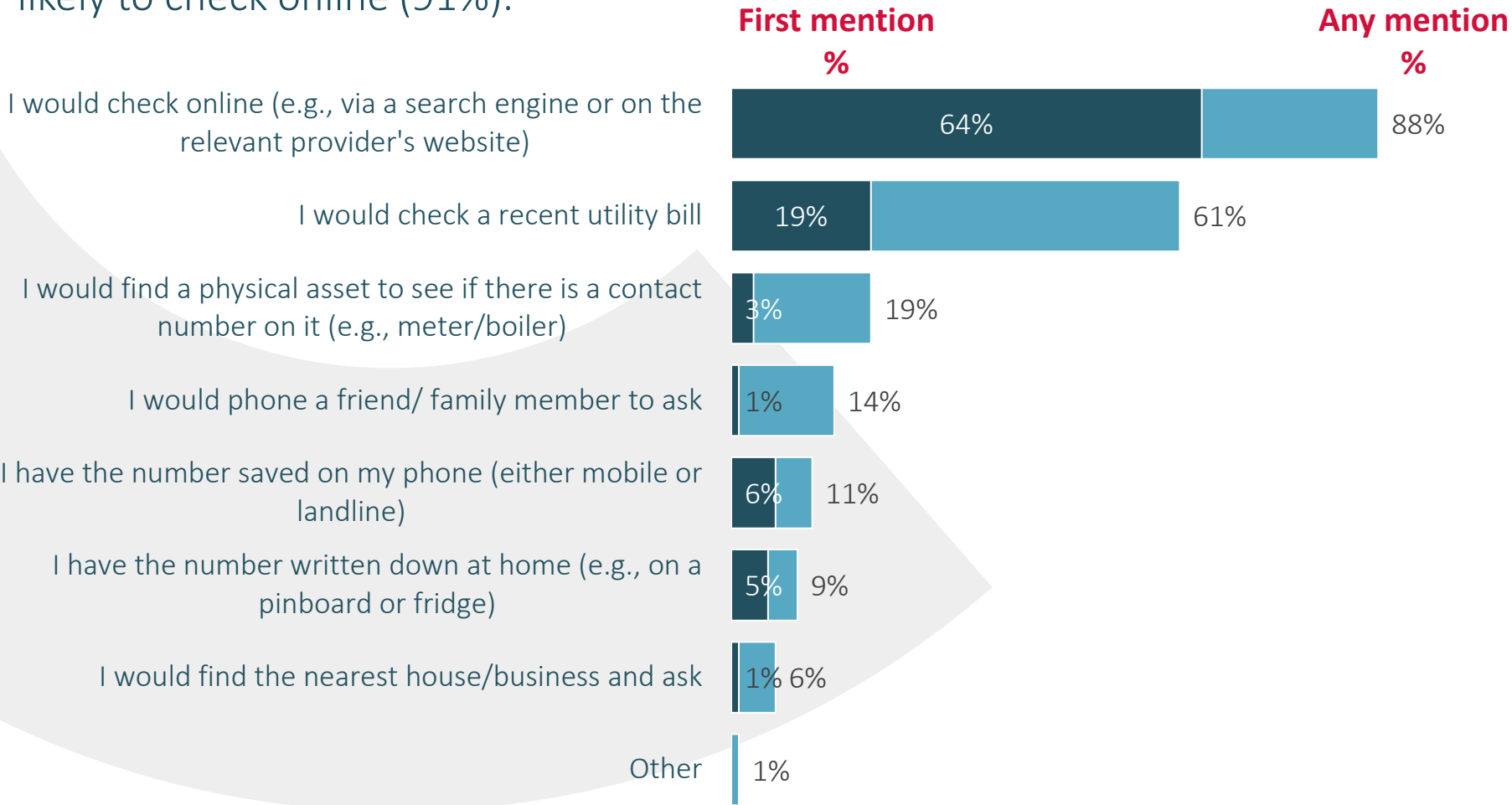


Q.20 In the event that you thought it necessary to report an incident involving electricity away from your home (e.g. fallen electrical lines as a result of storm damage), who would you contact first? Who else (if anyone) would you contact?
 (Base: All household decision makers, n=1307)

For electricity incident outside the home, how would you find the appropriate number for ESB?



88% would check online for the ESB phone number. Those aged 18-34 are the most likely to check online (91%).



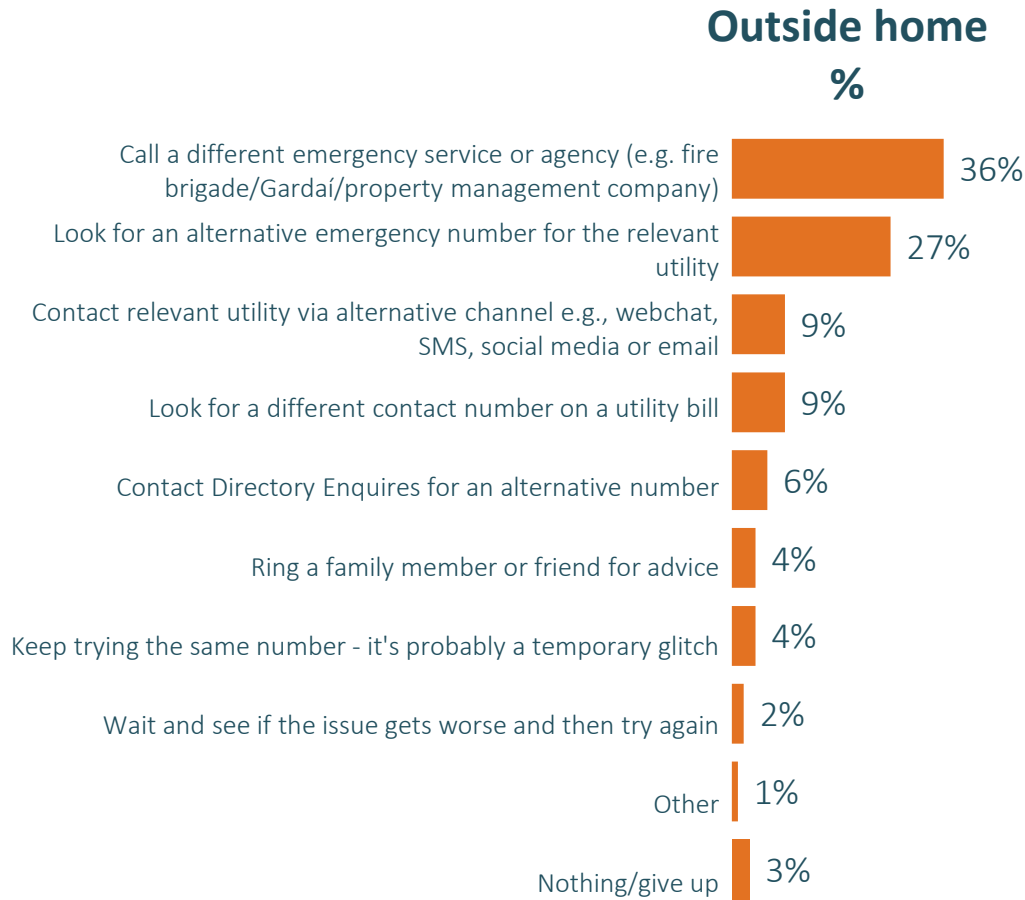
Age			
18-34 (n=256) %	35-54 (n=470) %	55-64 (n=176) %	65+ (n=225) %
91%	90%	86%	82%
52%	60%	62%	70%
25%	19%	17%	13%
18%	16%	12%	9%
7%	10%	16%	14%
8%	8%	11%	12%
7%	7%	4%	5%
1%	1%	1%	3%

Q.21 How would you most likely find the appropriate phone number to contact ESB? How else are you likely to find this number? (Base: All who would call ESB in case of incident out of the home, n=1127)

Likely action if could not get through to electricity utility



For an electricity incident outside the home, 36% would call a different emergency service or agency and 27% would look for an alternative emergency number for the relevant utility.



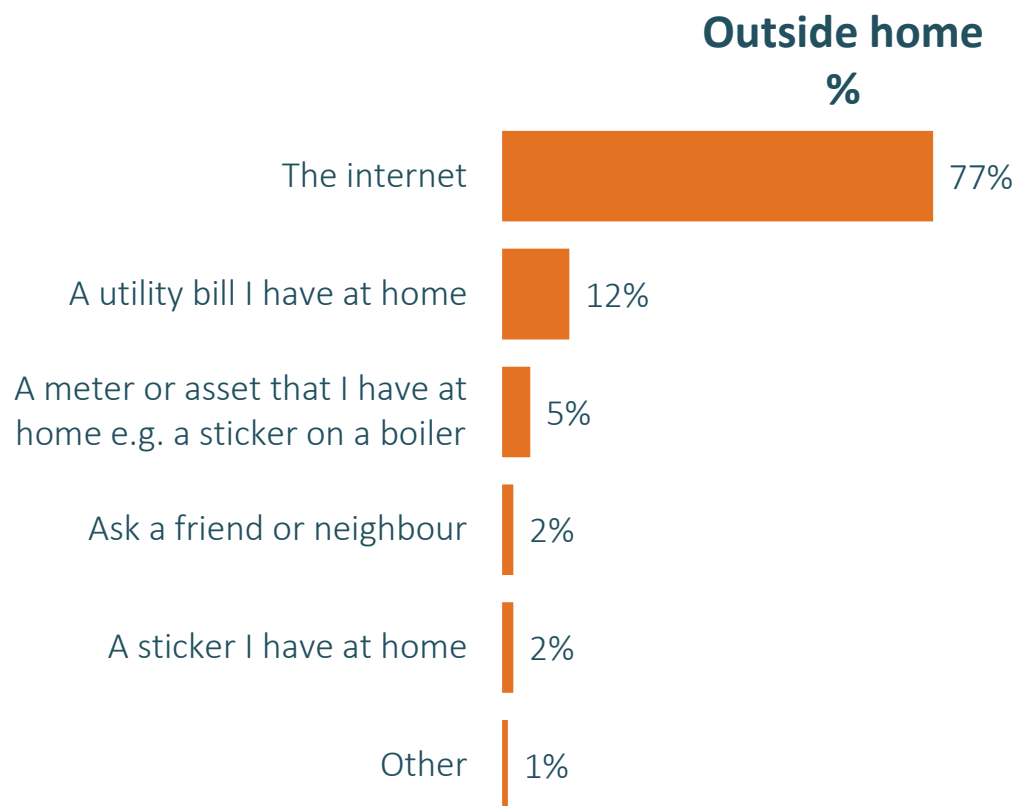
Age			
18-34 (n=321) %	35-54 (n=543) %	55-64 (n=200) %	65+ (n=243) %
28%	35%	35%	48%
29%	30%	30%	16%
9%	10%	10%	10%
13%	6%	8%	9%
9%	5%	7%	6%
6%	5%	2%	2%
2%	4%	5%	3%
1%	2%	1%	1%
-	1%	*	1%
3%	2%	3%	3%

Q22. In the event of an incident involving electricity outside your home and you could not get through to the utility supplier and there is no recorded message what would you do?
(Base: All household decision makers, n=1307)

Where would you look for an alternative number in the event of an electricity incident outside the home?



77% would look for an alternative number online.



	Age		
	18-34 (n=90) %	35-54 (n=166) %	55+ (n=103) %
The internet	78%	83%	64%
A utility bill I have at home	10%	8%	22%
A meter or asset that I have at home e.g. a sticker on a boiler	5%	5%	4%
Ask a friend or neighbour	1%	3%	2%
A sticker I have at home	4%	*	4%
Other	1%	*	3%



Q23a. Where would you look for an alternative number to call the utility provider regarding the electricity incident?
(Base: All who would look for an alternative emergency number during a electricity incident outside the home, n=359)

Persistence in reporting

57% would re-dial less than three times and 86% would only wait a few minutes between calls for an electricity incident outside the home*.



Behaviours noted from qualitative research

- Electricity incidents regarded as very serious. Some would call ESB first while others would call 999.
- If the number for the utility is not answered, respondents will call 999 or the local guards in the area to alert them/report the incident.
- Several cited remaining 'on the scene' until a resolution was found/the relevant services turned up.
- Treated with caution as a fallen pole or wire is a very tangible emergency.
- Reluctance to approaching the physical asset e.g. pole or wires. Some noted they would remain 'on the scene' until they had reported and/or the relevant help/utility/emergency service arrived to resolve the emergency.



No time to waste in this sort of situation



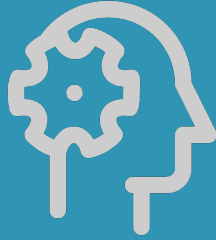
I would see it as my responsibility to alert the incident to the authorities and ensure other members of the public are safe until the situation is made safe.

5a

Water incidents in the home



Initial reaction to water incident in the home



Access the situation

Assumption that an incident involving water in your home is your responsibility.

Some will find the water main and shut it off and look to report the incident.

Some awareness of how to do this while others do not know.



Who to call

Most likely to call a plumber - number is likely saved in phone or could be sourced via Google or WhatsApp message to local groups.

If the situation required a utility supplier, Irish Water was widely known. People are also likely to call the local council for water incidents.



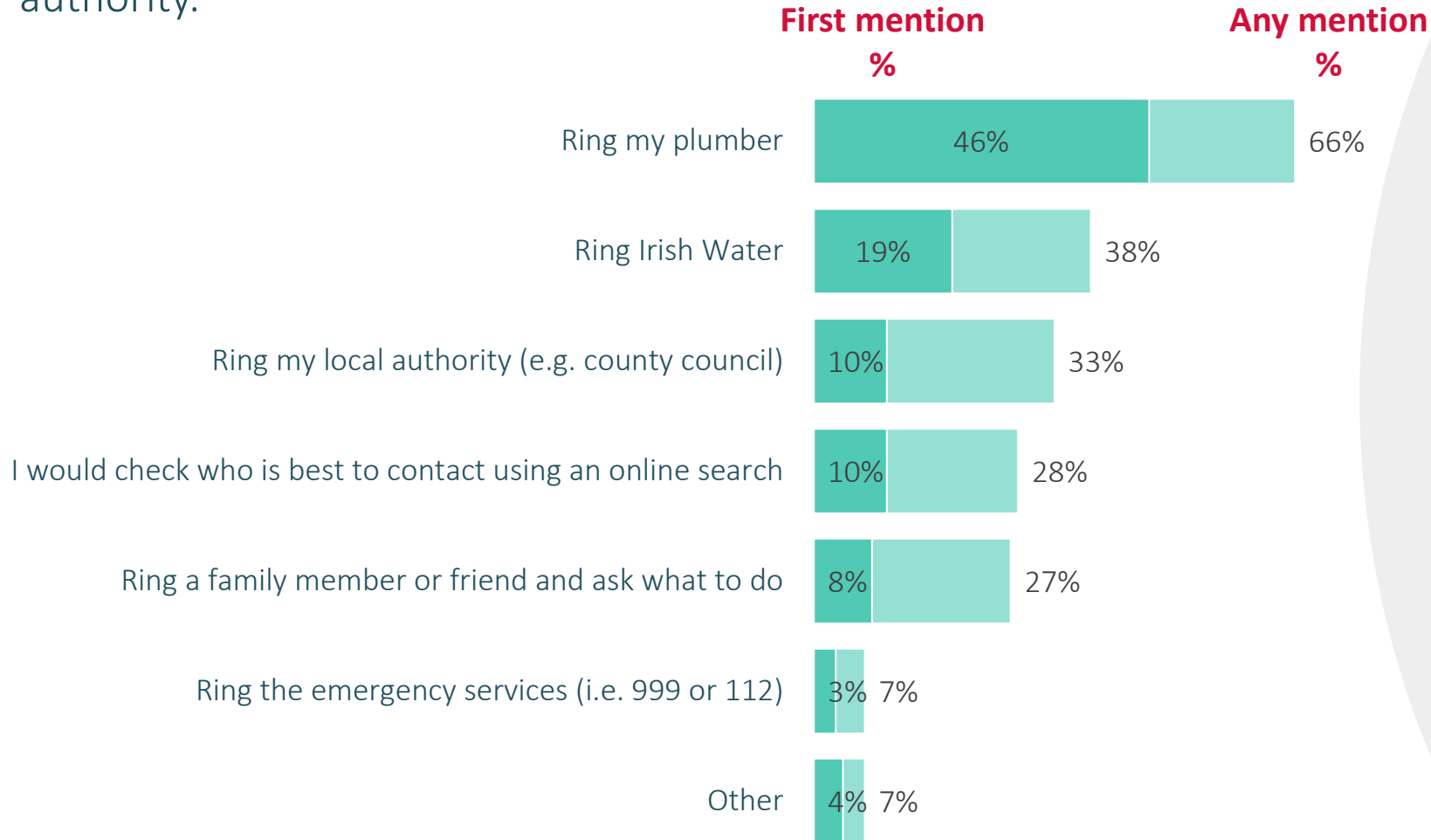
Reporting

Similar to gas and electricity, there is a need to speak to a person to report an incident.

Where Irish Water is called, people will use Google to get the phone number which is not likely to be written down at home anywhere.

Who would you report an incident involving water in the home to?

46% mentioned calling their plumber first in relation to incidents in the home. Irish Water is the second most commonly mentioned, followed by the local authority.



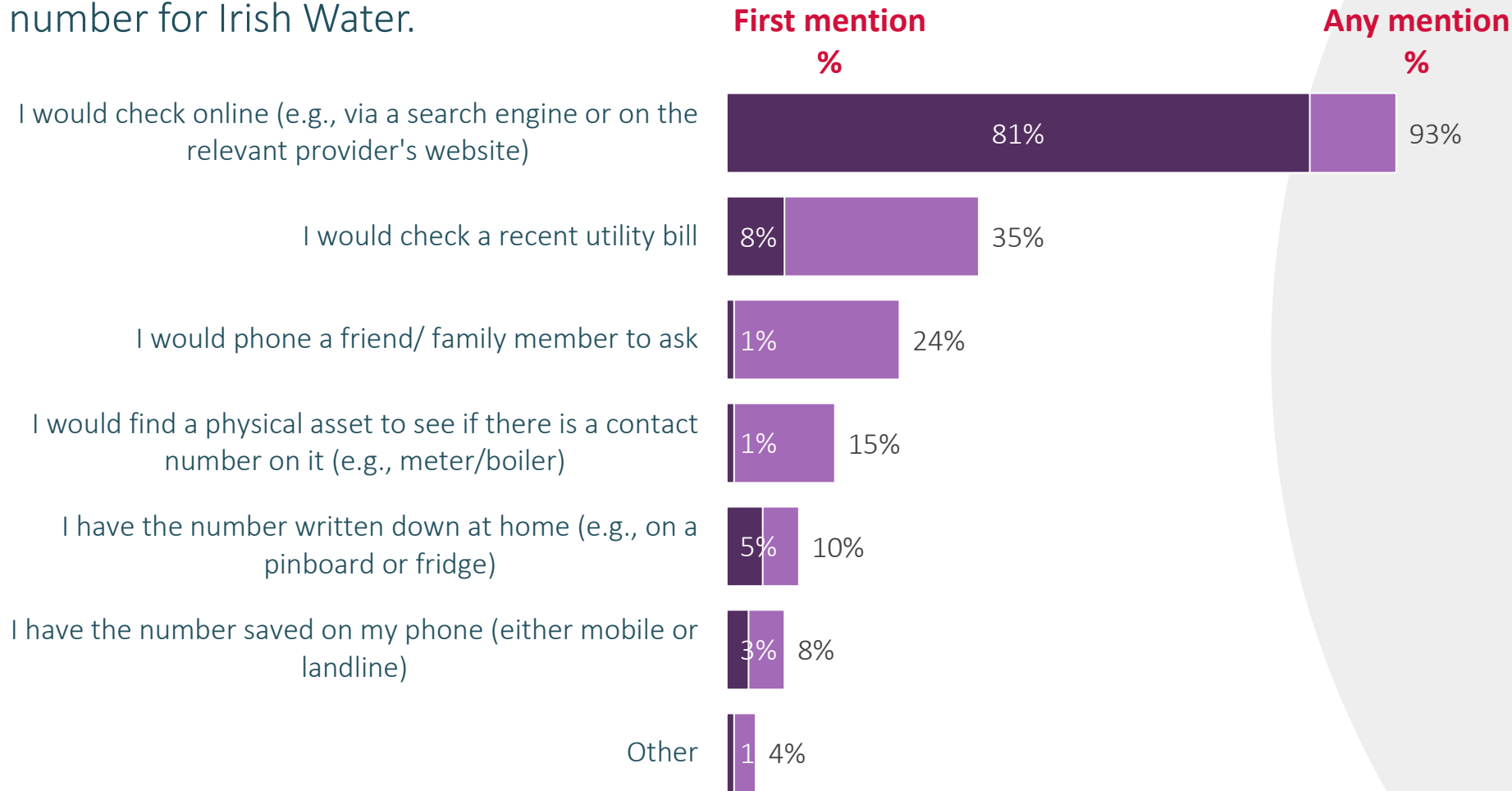
Age			
18-34 (n=321) %	35-54 (n=543) %	55-64 (n=200) %	65+ (n=243) %
59%	66%	68%	75%
40%	35%	39%	42%
41%	36%	28%	19%
37%	29%	26%	20%
21%	28%	30%	31%
9%	8%	6%	5%
7%	7%	10%	7%

Q.13 In the event that you thought it necessary to report an incident involving water in your home (e.g. a burst water pipe) who would you contact first? Who else, if anyone, would you contact?
(Base: All household decision makers, n=1307)

For water incident in the home, how would you find the appropriate number for Irish Water?



For incidents in the home, 93% would check online to find the appropriate number for Irish Water.



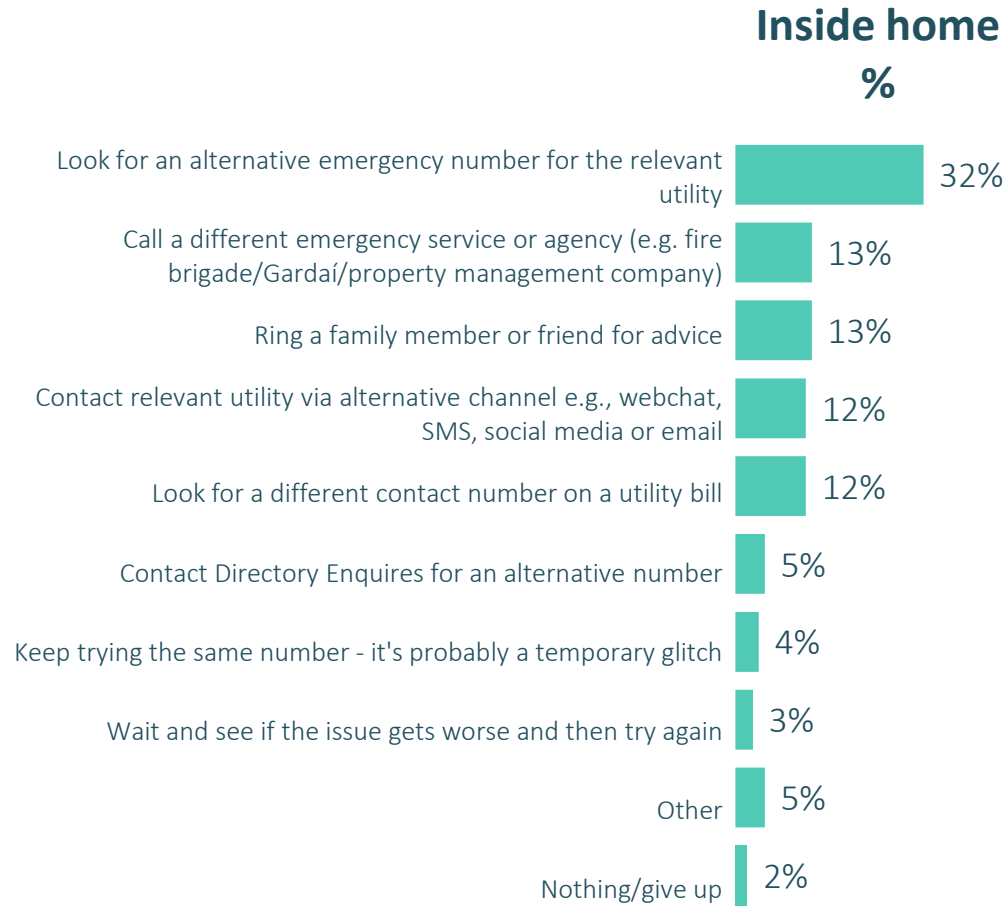
Age			
18-34 (n=143) %	35-54 (n=211) %	55-64 (n=85) %	65+ (n=105) %
95%	92%	98%	89%
36%	36%	26%	41%
27%	24%	26%	20%
21%	18%	10%	9%
6%	8%	14%	16%
5%	8%	8%	10%
1%	1%	9%	11%

Q.15 How would you most likely find the appropriate phone number to contact Irish Water? How else are you likely to find this number?
(Base: All who would call Irish Water in case of incident in the home, n=544)

Likely action if could not get through to water utility



For a water incident in the home, 32% would look for an alternative number for the water utility if they couldn't get through to the utility on a particular contact number.

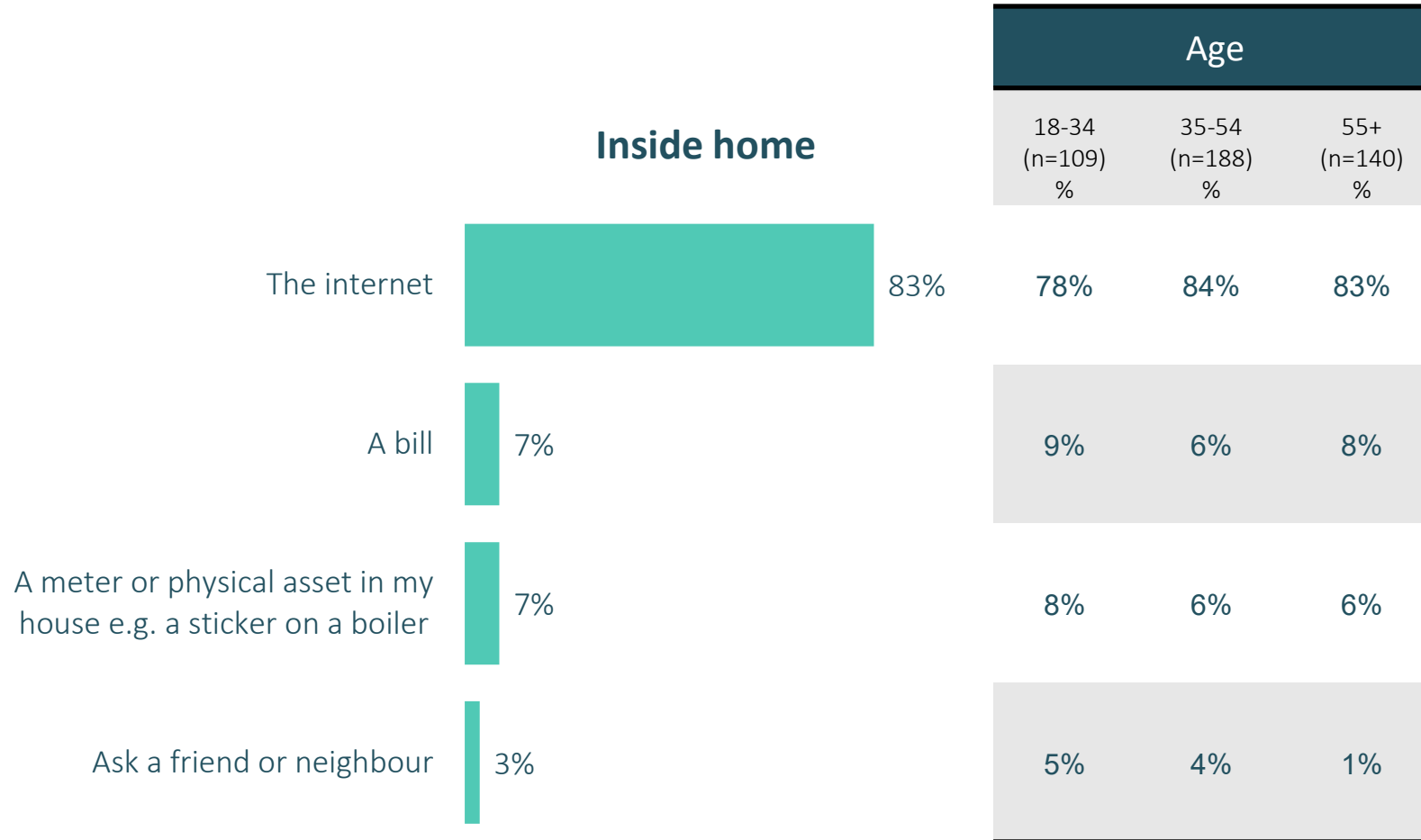


	Age			
	18-34 (n=321) %	35-54 (n=543) %	55-64 (n=200) %	65+ (n=243) %
Look for an alternative emergency number for the relevant utility	33%	34%	31%	28%
Call a different emergency service or agency (e.g. fire brigade/Gardai/property management company)	10%	15%	11%	14%
Ring a family member or friend for advice	17%	12%	14%	9%
Contact relevant utility via alternative channel e.g., webchat, SMS, social media or email	9%	15%	11%	10%
Look for a different contact number on a utility bill	17%	8%	13%	13%
Contact Directory Enquires for an alternative number	3%	6%	7%	6%
Keep trying the same number - it's probably a temporary glitch	3%	4%	2%	6%
Wait and see if the issue gets worse and then try again	4%	3%	2%	2%
Other	4%	3%	6%	9%
Nothing/give up	1%	1%	2%	3%

Q.16 In the event of an incident involving water in your home where you could not get through to the utility provider using a particular contact number and there is no recorded message instructing you on an alternative number to call, what would you do?
(Base: All household decision makers, n=1307)

Where would you look for an alternative number in the event of a water incident in the home?

83% would look online for an alternative number for the water utility provider.



Q17a. Where would you look for an alternative number to call regarding the water incident?
 (Base: All who would look for an alternative emergency number during a water incident inside the home n=437)

Persistence

38% would re-dial less than three times and 56% would only wait a few minutes between calls for a water incident inside the home*.



Behaviours noted from qualitative research

- A water incident, while serious, is not perceived as life threatening.
- Can be controlled in the short term by shutting off the water supply.
- In home incidents not perceived as the responsibility of Irish Water – paid private plumber most likely called using a number either saved in phone or searched for.
- Online was the main means of checking how to report/finding the appropriate number. Very little reported reliance on any printed material from Irish Water.



You don't want to experience a water leak in home but if I had to pick between it and gas and electricity I would pick water.



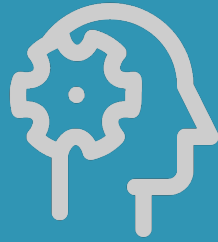
There is no advertising of who to call for a water emergency people just think of Irish water or local council if not a plumber.

5b

Water incidents
outside the home



Initial reaction to water incident out of home



Access the situation

Of all scenarios researched, a water incident on street is the one least likely to be reported.

If the incident is bad enough, there is an assumption that somebody else would have reported it.

Scenario not considered life threatening in comparison with other scenarios explored.



Who to call

Clear awareness of Irish Water as a body responsible for leaks – as well as the council/local authority. Concern about how easy it would be to contact somebody in either organisation and how long they would take to respond, once contacted.



Reporting

Although regarded as less dangerous than other incident types, there is still a preference to speak to somebody to report an incident.

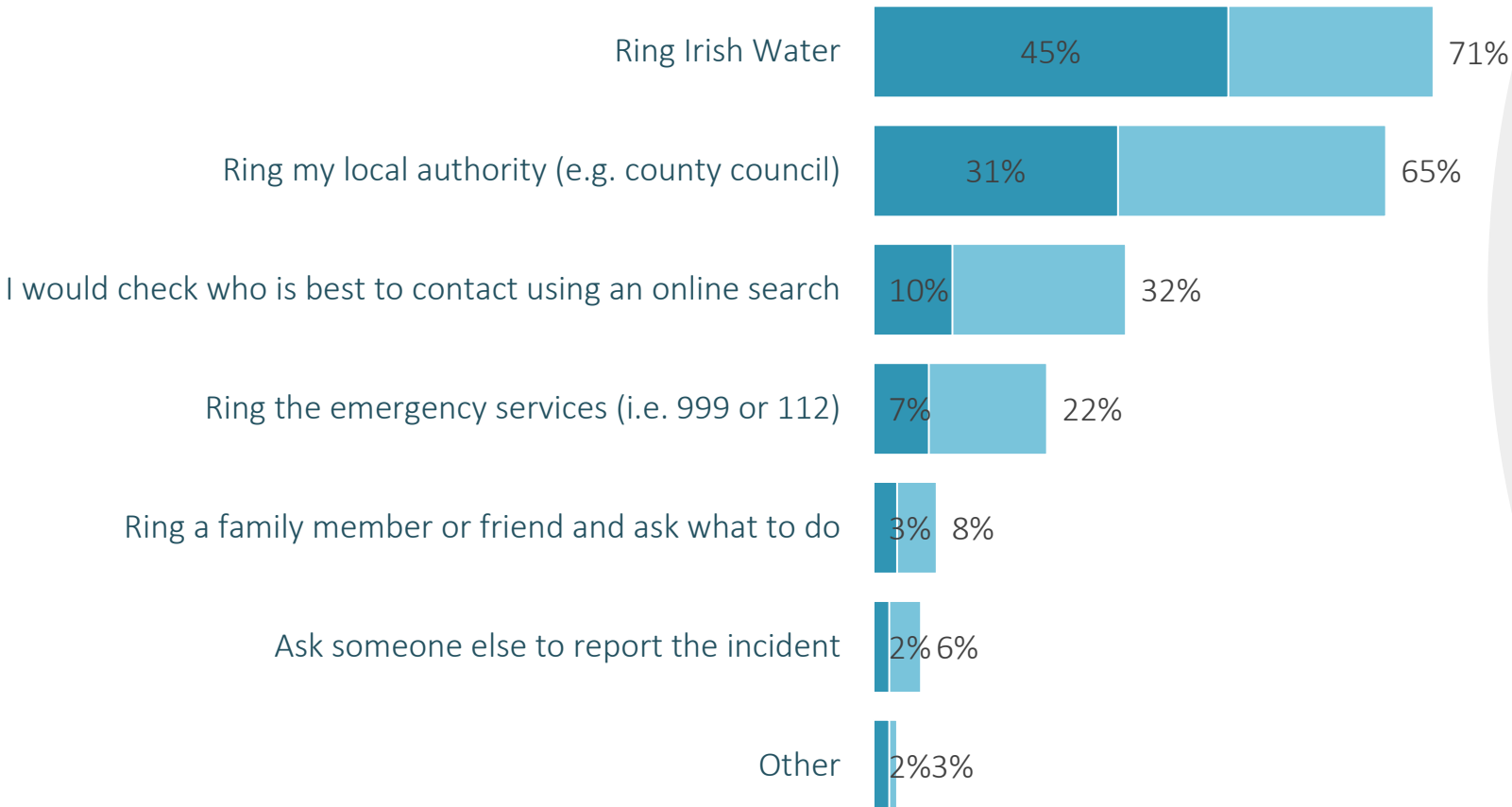
Who would you report an incident involving water outside the home to?



Irish Water is the main organisation people would contact for an incident involving water outside the home.



First mention % **Any mention %**

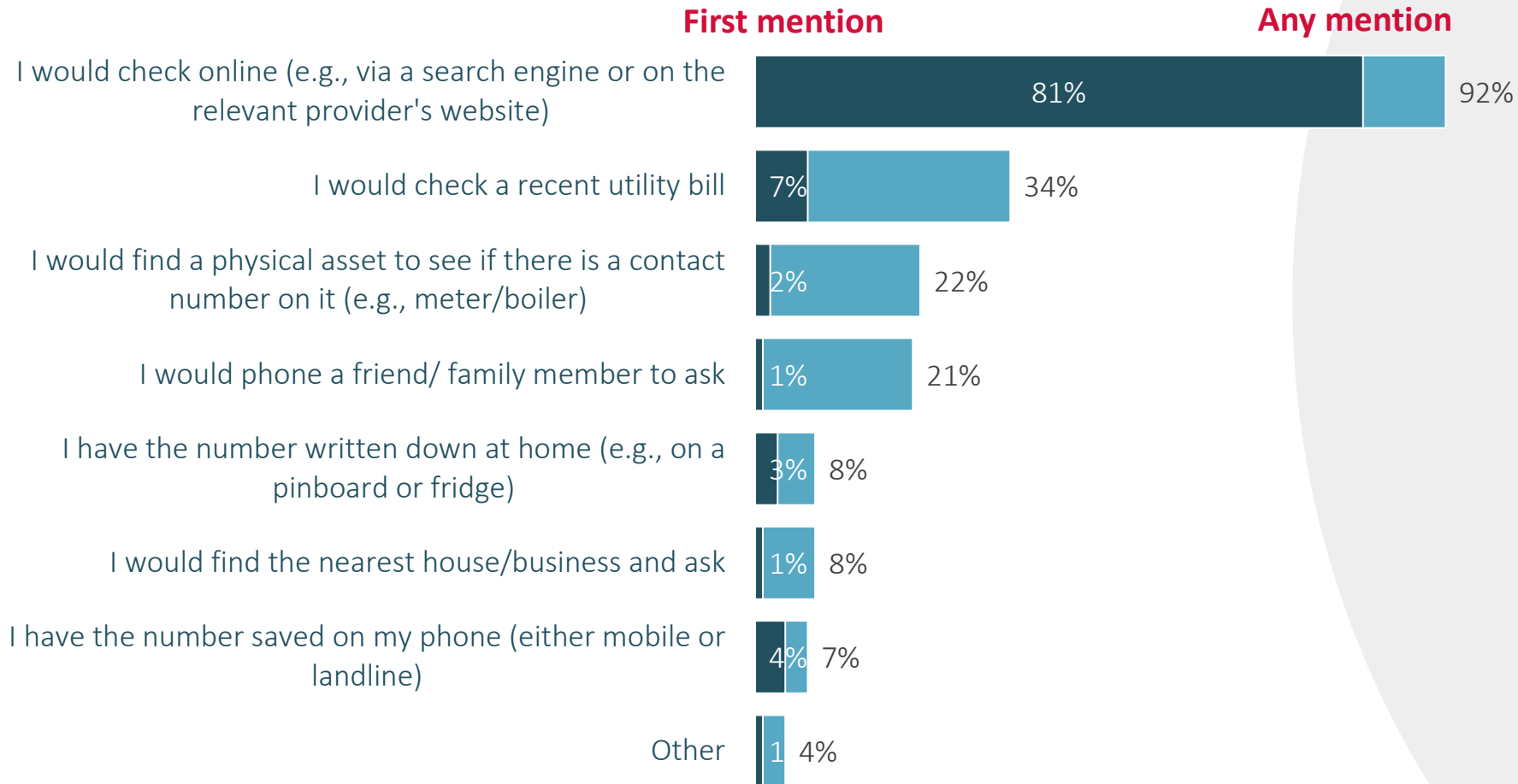


Age			
18-34 (n=321) %	35-54 (n=543) %	55-64 (n=200) %	65+ (n=243) %
69%	68%	66%	76%
51%	66%	31%	16%
38%	36%	22%	30%
22%	19%	4%	1%
17%	8%	4%	4%
8%	7%	-	-
2%	3%	2%	3%

Q.19 In the event that you thought it necessary to report an incident involving water away from your home (e.g. burst water pipe on a street), who would you contact first? Who else (if anyone) would you contact?
(Base: All household decision makers, n=1307)

For water incident outside the home, how would you find the appropriate number for Irish Water?

92% would check online for the appropriate number for Irish Water for water incident outside the home.



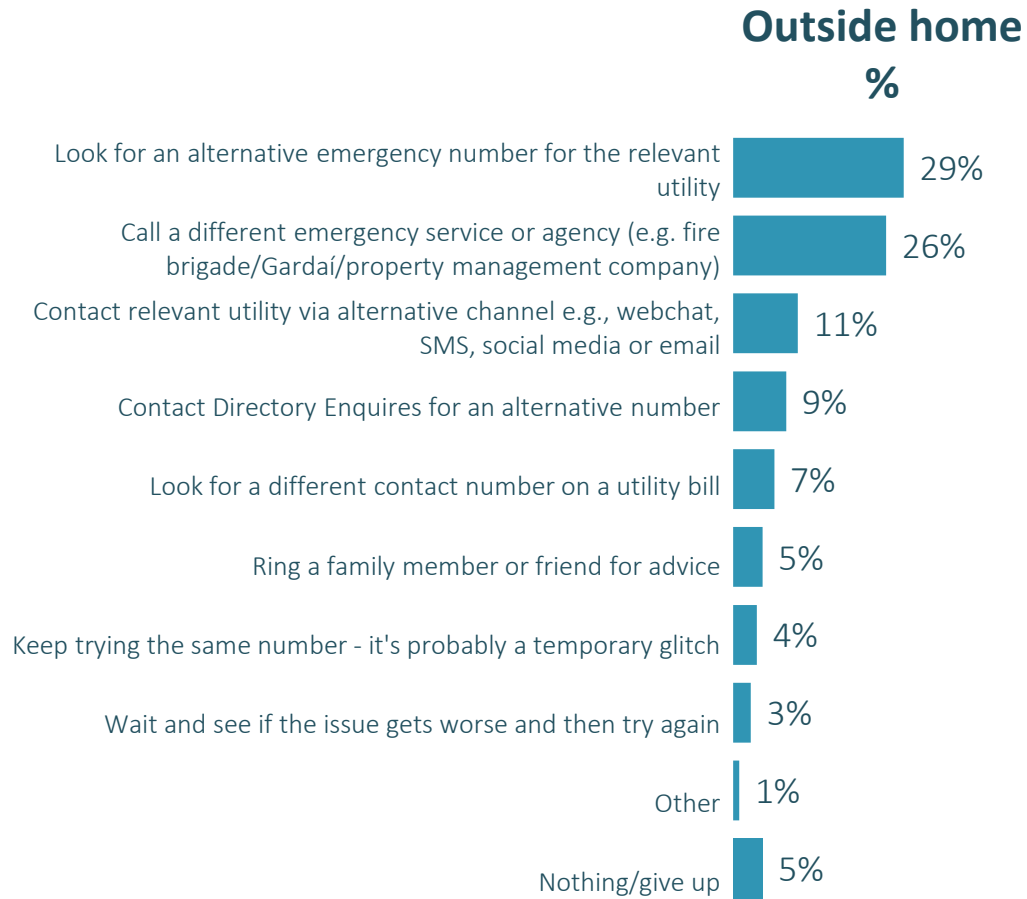
Age			
18-34 (n=220) %	35-54 (n=372) %	55-64 (n=148) %	65+ (n=190) %
89%	95%	97%	86%
42%	32%	26%	33%
22%	24%	22%	21%
20%	22%	18%	23%
7%	9%	9%	8%
5%	6%	6%	14%
7%	7%	7%	8%
1%	2%	6%	10%

Q.21 How would you most likely find the appropriate phone number to contact Irish Water? How else are you likely to find this number? (Base: All who would call Irish Water in case of incident outside the home, n=930)

Likely action if could not get through to water utility



For a water incident outside the home, 29% would look for an alternative number for the utility and 26% would call a different emergency service or agency if they couldn't get through to the utility on a particular contact number.



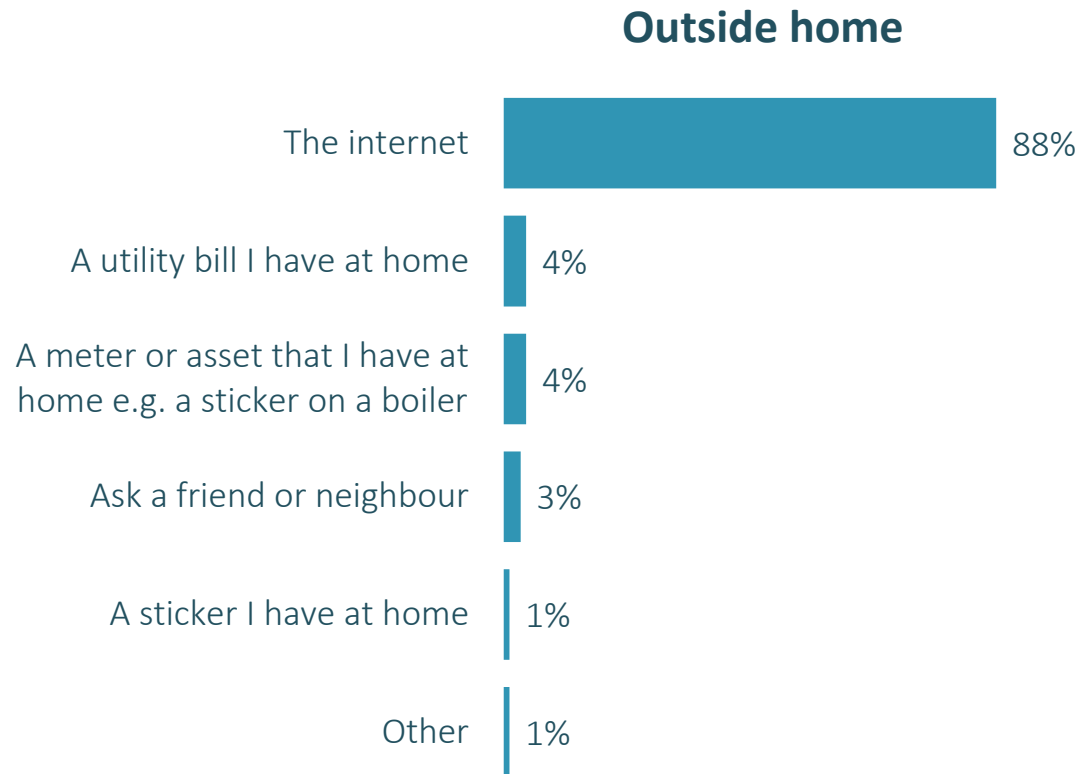
Age			
18-34 (n=321) %	35-54 (n=543) %	55-64 (n=200) %	65+ (n=243) %
27%	32%	34%	23%
21%	27%	22%	33%
14%	11%	11%	9%
8%	8%	9%	11%
11%	5%	6%	7%
9%	5%	3%	2%
3%	4%	4%	3%
2%	3%	3%	3%
*	1%	3%	3%
5%	5%	4%	5%



Q22 In the event of an incident involving water outside your home and you could not get through to the utility supplier and there is no recorded message what would you do?
(Base: All household decision makers, n=1307)

Where would you look for an alternative number in the event of a water incident outside the home?

88% would look online for an alternative number for the water utility.



Age		
18-34 (n=93) %	35-54 (n=184) %	55+ (n=120) %
83%	90%	89%
5%	3%	5%
3%	4%	3%
6%	3%	1%
2%	*	-
	1%	2%



Q23a. Where would you look for an alternative number to call the utility provider regarding the water incident?
(Base: All who would look for an alternative emergency number during a water incident outside the home, n=397)

Persistence

57% would re-dial less than three times and 68% would only wait a few minutes between calls for a water incident outside the home*.



Behaviours noted from qualitative research

- Google is used to find emergency contact numbers.
- If it is difficult to get in contact with Irish Water or local council, some are likely to give up and leave the incident unreported. Some cited that online reporting options might be useful here e.g. live chat.
- Very unlikely to approach a physical asset or find a phone number to contact in printed form e.g. leaflet/bill etc.
- Awareness of emergency numbers was lower for water and some reported that a water incident would not be treated as serious an emergency as for gas or electricity.



I would be happy to log a incident on a live chat function if it's not really important to report in the first instance and there were issues getting through on the phone.



You wouldn't call the guards for something like this – it's not serious enough



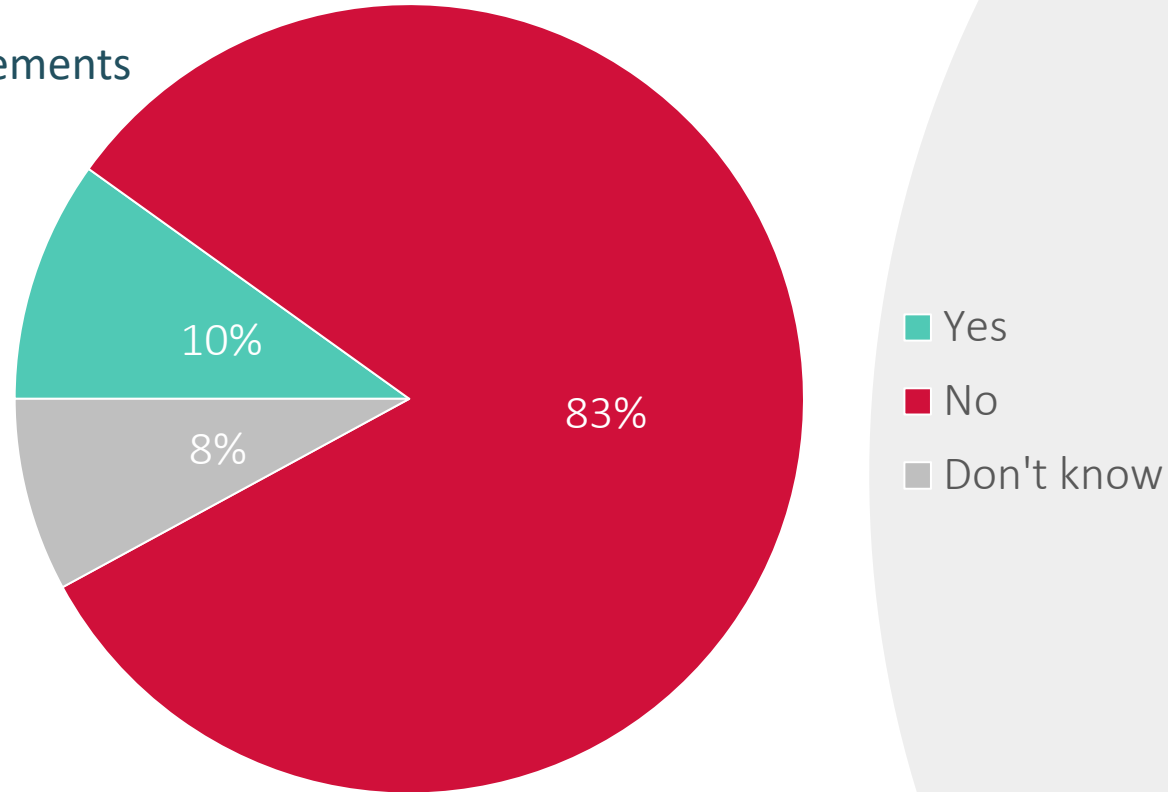
6 - Annex

1 in 10 recall seeing any ads/campaigns regarding NGNs



Recall is higher among natural gas customers

Recall of campaigns/advertisements



In the qualitative research, the majority were not familiar with the term 'Non-Geographic Number' however, when given examples of NGNs were very aware of the existence of these ranges and the differences in non-geographic versus standard landline numbers.

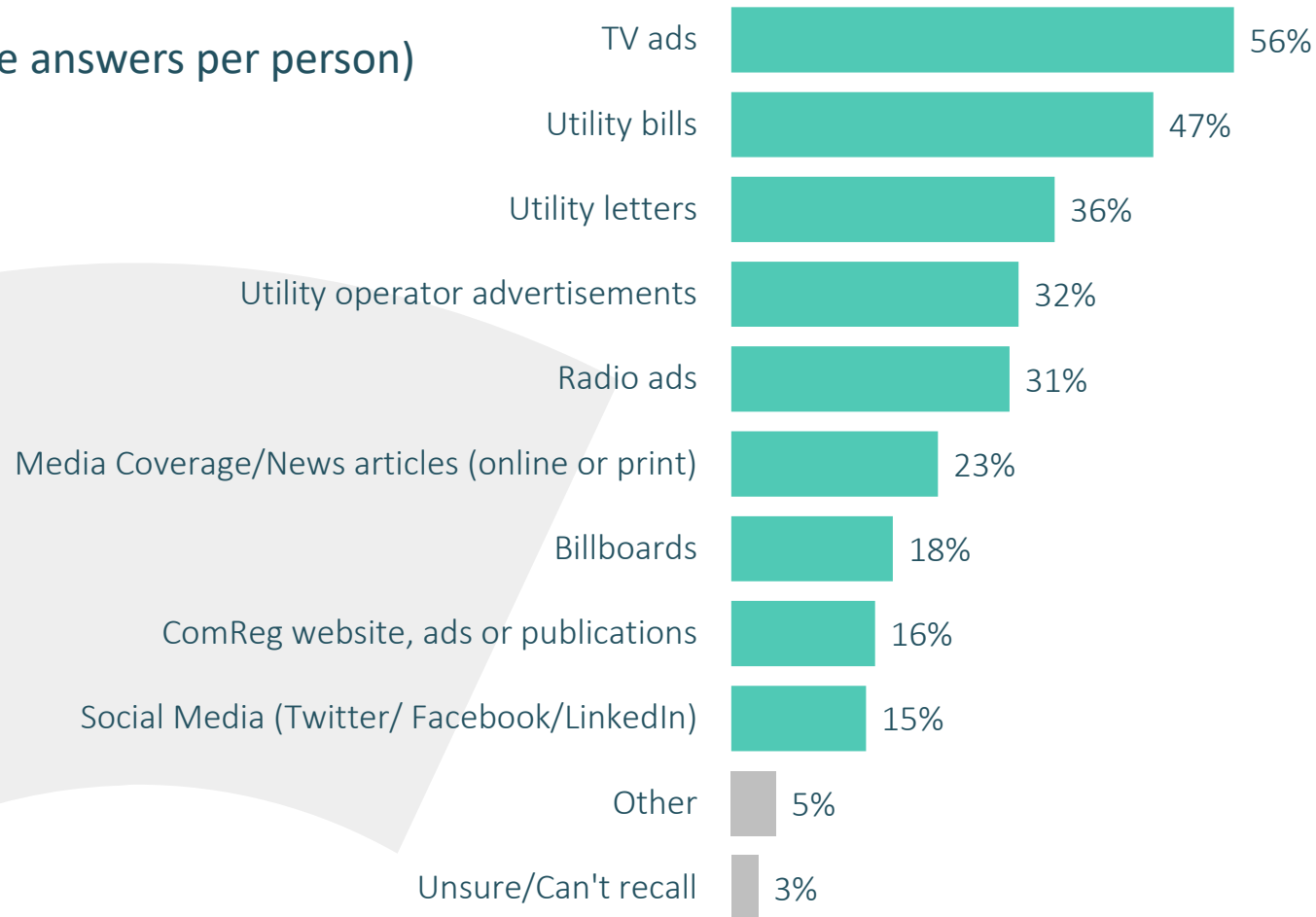
TV is the most common source of recall for advertising of NGNs



Other common sources include utility bills and letters, utility operator advertisements, and radio ads.

Where do you recall having seen advertising for NGNs?

(Allowed for multiple answers per person)



1800 Numbers

- The vast majority were aware of the existence of 1800 numbers and their use for service provision e.g. banking, public services etc.
- Most were also aware that 1800 numbers are free to call.
- Will typically dial 1800 numbers from a mobile but may also dial from a landline depending on circumstances.



If you need to call these numbers you just call them. I wouldn't be overly concerned about cost. I haven't noticed been charged for calling these types of numbers.

0818 Numbers



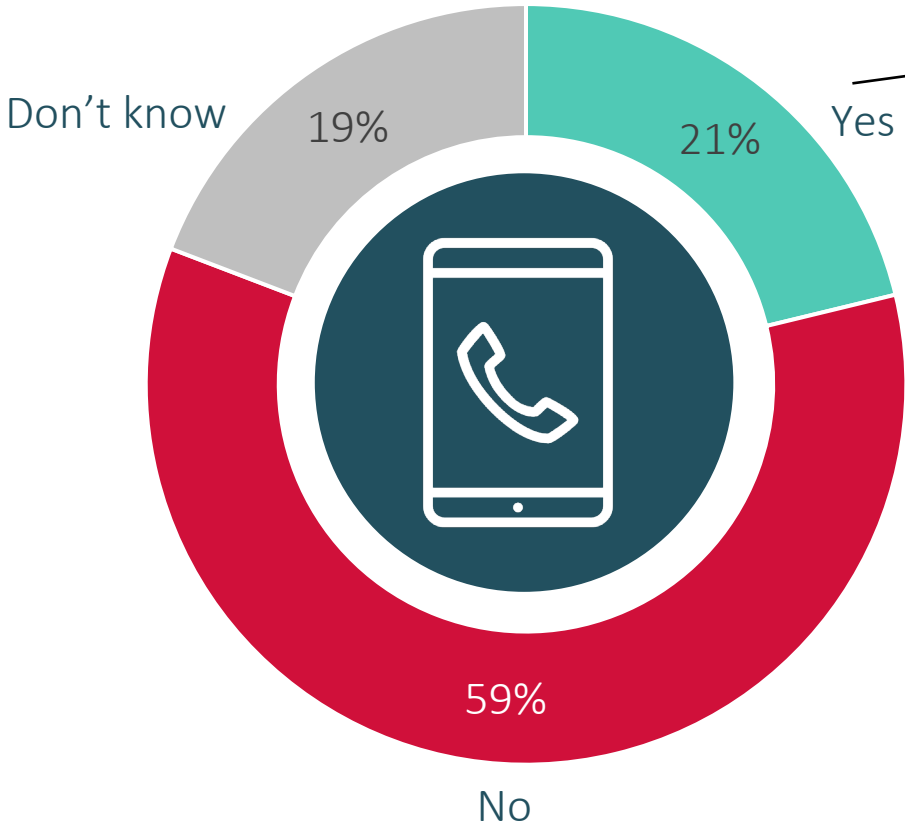
- Awareness of 0818 number range generally lower than awareness/familiarity with 1800 numbers, as is understanding of the costs associated with dialling the 0818 range.
- Some consider that these numbers are free to call but others know charges are incurred – if not included in their phone plan.
- Cost of calling not mentioned as a barrier to making contact, with many on contracts which include free calls to 0818 numbers.

Call avoidance/Non reporting



Only 1 in 5 would avoid calling an NGN for fear of call charge.

A slightly higher proportion of younger cohorts have avoided or would avoid calling an NGN to report an incident for fear of call charges.



Concerned about incurring charges

Age	Yes
18-34	29%
35-54	19%
55 -64	25%
65+	14%

Q24. When thinking about reporting an incident to a gas/water/electric company have you avoided or would you avoid calling a non-geographic number for fear of call charges i.e. incurring additional charges on your phone bill?

(Base: All household decision makers, n=1307)

Quotes



Group	Emergency	Quote
65+	Gas out of home	The TV ad for a gas emergency 'sticks in your mind'
65+	Water out of home	'Less of an emergency with water'
50-64	Water out of home	'You would want to talk to someone in an emergency'
35-49	Electricity out of home	Even if the number is visible [on a physical asset] I would still go to Google
75+	Gas out of home	Gas Networks Ireland is embedded in your memory [from TV ads]
75+	Gas out of home	The stuff [GNI ad] on TV is very good and very clear
75+	Generally	Would not look for a number on an asset – would be hesitant [to approach one]

Quantitative Survey Questionnaire



2022 Utility NGN Survey

QUESTIONNAIRE 17-10-22



ASK ALL DECISION MAKERS 18+ ADULTS

DEMOGRAPHICS

ASK ALL

Q1. Are you the person in your household who is the decision maker/joint decision maker for the selection and payment of utility suppliers in your household?

- Yes
- No – Close and recruit substitute.
- I share the responsibilities

ASK ALL -single code

Q2. Are you?

- Male
- Female
- Other
- Prefer not to say

ASK ALL – Single code

Q3. Which of the following age brackets do you belong to?

- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+

ASK ALL – Single code

Q4. What is the Occupation of the head of household?

- Higher managerial/ professional/ administrative (e.g. Established Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level Civil Servant/ Public Service/ Government employee)
- Intermediate managerial/ professional/ administrative (e.g. Newly qualified (under 3 years) Doctor, Solicitor/ Lawyer, Board Director small organisation, Middle Manager in large organisation, Principle Officer in civil service/ local government)
- Supervisory or clerical/ junior managerial/ professional/ administrative (e.g. Office worker, Student Doctor/ Med Student/ Foreman with 25+ employees, Salesperson, Nurse, Teacher, etc.) OR Student
- Skilled worker (e.g. Skilled Bricklayer, Carpenter, Plumber Painter, Bus/ Ambulance Driver, HGV driver, AA patrolman, Police, Firefighter, Chef, Barman, etc.)
- Semi or unskilled work (e.g. Manual workers, all apprentices to be skilled trades, Caretaker, Park Keeper, non-HGV Driver, Shop assistant)
- Casual worker – not in permanent employment, Housewife/ Homemaker, Retired and living on state/ Government pension, Unemployed or not working due to long-term sickness, Full-time carer or other household member
- Farmer/ Agricultural worker

ASK ALL – Single code

Q5. What is your current employment status?

- Working full time (30+ hours)
- Working part time (<30 hours)
- Unemployed
- Working within the home
- Retired
- Student

ASK ALL – Single code

Q6. Which of the following best describes the area in which you live?

- A city
- A large town (population of 5,000+)
- A small town (population of 1,500 – 4,999)
- A town or area with a population of fewer than 1,500
- A rural or remote area

Quantitative Survey Questionnaire



ASK ALL – Single code

- Q7. Do you use natural gas in your home?
- Yes
 - No
 - Don't Know

ASK ALL – Single code

- Q8. If you have a mobile phone, are you a bill-pay or prepay customer?
- Bill-pay
 - Prepay
 - Don't have mobile phone

BACKGROUND

The purpose of this survey is to inform ComReg about how and when consumers contact the utility services in Ireland, namely ESB Networks (ESBN), Gas Networks Ireland (GNI) and Irish Water (IW), in the event of an emergency situation or where an incident needs to be reported.

Non-Geographic Numbers

NGNs are telephone numbers used by organisations and businesses to provide services such as public services, helplines and banking to consumers and clients. Unlike geographic (landline) numbers (e.g. 01 for Dublin or 061 for Limerick), an NGN does not relate to a particular geographic area. An example of an NGN is an 1800 number.

ASK ALL – Single code

CALLING AN NGN

- Q9. By which means do you normally make phone calls?
- Landline
 - Mobile Phone without access to the internet
 - Mobile phone with access to the internet (Le. smartphone)
 - Internet calling (e.g. Skype)

ASK ALL – Single code

- Q10. Do you recall having seen any campaigns or advertisements regarding Non-Geographic Numbers?
- Yes
 - No
 - Don't Know

ASK IF YES Q10.

- Q11. In which of the following places, if any, have you seen advertising for Non-Geographic numbers? **[Select all that apply]**
- Utility operator advertisements
 - TV ads
 - Social Media (Twitter/Facebook/LinkedIn)
 - ComReg website, ads or publications
 - Utility bills
 - Utility letters
 - Billboards
 - Radio ads
 - Media Coverage/News articles (online or print)
 - Other – please specify
 - Unsure/Can't recall

SCENARIOS

Part I: Inside the home

The following set of questions relate to how you would react to an incident inside your home.

ROTATE START ORDER OF Q12,13,14

ASK IF YES Q7. RECORD FIRST MENTIONS AND OTHER MENTIONS. RECORD MAX OF THREE MENTIONS.

- Q12. In the event that you thought it necessary to report an incident involving gas in your home (e.g. because you smelt gas or otherwise), who would you contact first? Who else, if anyone, would you also contact?
- Rotate order of list**
- a) I would check who is best to contact using an online search
 - b) Ring Gas Networks Ireland emergency line
 - c) Ring my registered gas installer

Quantitative Survey Questionnaire



- d) Ring my gas provider e.g., Bord Gáis, Energia, Flogas etc.
- e) Ring my local authority (e.g., county council)
- f) Ring the emergency services (i.e., 999 or 112)
- g) Call family member or friend
- h) Other
 - o Please specify _____
- None [Only show in second round]

ASK ALL RESPONDENTS. RECORD FIRST MENTIONS AND OTHER MENTIONS. RECORD MAX OF THREE MENTIONS.

Q13. In the event that you thought it necessary to report an incident involving water in your home (e.g. a burst water pipe) who would you contact first? Who else, if anyone, would you contact?

Rotate order of list

- a) I would check who is best to contact using an online search
- b) Ring Irish Water
- c) Ring my plumber
- d) Ring my local authority (e.g., county council)
- e) Ring the emergency services (i.e., 999 or 112)
- f) Ring a family member or friend and ask what to do
- g) Other
 - o Please specify _____
- None [Only show in second round]

ASK ALL RECORD FIRST MENTIONS AND OTHER MENTIONS. RECORD MAX OF THREE MENTIONS.

Q14. In the event that you thought it necessary to report an incident involving electricity in your home, who would you contact first? Who else, if anyone, would you contact?

Rotate order of list

- a) I would check who is best to contact using an online search
- b) Ring the ESB emergency line
- c) Ring an electrician
- d) Ring my electricity provider e.g. Electric Ireland, Bord Gáis, Energia etc.
- e) Ring my local authority (e.g., county council)
- f) Ring the emergency services (i.e. 999 or 112)
- g) Ring a family member or friend and ask what to do
- h) Other
 - o Please specify _____
- None [Only show in second round]

ASK IF ANSWERED (B) (i.e., all instances where 'ring emergency/utility line' was answered) TO Q12, Q13 AND/OR Q14. ASK FOR EACH SERVICE AS APPROPRIATE.

RECORD FIRST MENTIONS AND OTHER MENTIONS.

Q15. How would you most likely find the appropriate phone number to contact <insert organisation>? Single code. How else are you likely to find this number?

Rotate list

- a) I would check online (e.g., via a search engine or on the relevant provider's website)
- b) I would check a recent utility bill
- c) I have the number saved on my phone (either mobile or landline)
- d) I have the number written down at home (e.g., on a pinboard or fridge)
- e) I would find a physical asset to see if there is a contact number on it (e.g., electricity pole, water meter, gas meter, boiler)
- f) I would phone a friend/family member to ask
- g) Other
 - o Please Specify _____
- None [Only show in second round]

Q16. In the event of an incident involving gas (If yes Q7)/water/electricity in your home where you could not get through to the utility provider using a particular contact number and there is no recorded message, instructing you on an alternative number to call, what would you do? [Check X in the box of choice] **SINGLE CODE FOR EACH OPTION USED.**

		Gas If yes Q7	Electricity	Water
A	Call a different emergency service or agency (e.g. fire brigade/Gardaí/property management company)			
B	Keep trying the same number – it's probably a temporary glitch			
C	Wait and see if the issue gets worse and then try again			
D	Look for an alternative emergency number for the relevant utility			
E	Ring a family member or friend for advice			
F	Look for a different contact number on a utility bill			
G	Contact relevant utility via alternative channel e.g., webchat, SMS, social media or email			
H	Contact Directory Enquires for an alternative number			
I	Nothing/give up			
J	Other (please describe)			

Quantitative Survey Questionnaire



ASK IF ANSWERED (D) to Q16. RECORD SEPERATELY FOR EACH D OPTION SELECTED.

- Q17. A. Where would you look for an alternative number to call regarding the <INSERT SERVICE> incident?
- A bill
 - A meter or physical asset in my house e.g. a sticker on a boiler
 - The internet
 - Ask a friend or neighbour
 - Other (please describe)

ASK IF ANSWERED (B) to Q16. ASK FOR EACH B SELECTED AT Q16

- Q17. B. How many times do you estimate you would re-dial the same number and try again <FOR GAS> <FOR WATER> <FOR ELECTRICITY>?
- Once
2-3 times
3-4 times
5-9 times
10+ times
Don't Know

ASK IF ANSWERED (B) or (C) to Q16. RECORD SEPERATELY FOR <FOR GAS> <FOR WATER> <FOR ELECTRICITY>?

- Q17. C. How long would you wait before calling again IN RELATION TO <GAS><ELECTRICITY><WATER> ?
- A few minutes
 - A few hours
 - The following day
 - The following week
 - Other (please describe)

Part II: Outside the Home

The following set of questions relate to how you would react to an incident outside of your home. ROTATE START ORDER Q18/Q19/20

ASK ALL

RECORD FIRST MENTIONS AND OTHER MENTIONS.RECORD MAX 3.

Q18. In the event that you thought it necessary to report an incident involving gas away from your home (e.g. because you smelt gas on a street), who would you contact first? Who else (if anyone) would you contact?

Rotate list

- I would check who is best to contact using an online search
 - Ring Gas Networks Ireland emergency line
 - Ring my local authority (e.g., county council)
 - Ring the emergency services (i.e., 999 or 112)
 - Ask someone else to report the incident
 - Ring a family member or friend and ask what to do
 - Other
 - Please specify _____
- None [Only show in second round]

RECORD FIRST MENTIONS AND OTHER MENTIONS. RECORD MAX 3.

Q19. In the event that you thought it necessary to report an incident involving water away from your home (e.g. burst water pipe on a street), who would you contact first? Who else (if anyone) would you contact?

Rotate start order

- I would check who is best to contact using an online search
 - Ring Irish Water
 - Ring my local authority (e.g., county council)
 - Ask someone else to report the incident
 - Ring the emergency services (i.e., 999 or 112)
 - Ring a family member or friend and ask what to do
 - Other
 - Please specify _____
- None [Only show in second round]

RECORD FIRST MENTIONS AND OTHER MENTIONS. RECORD MAX 3.

Q20. In the event that you thought it necessary to report an incident involving electricity away from your home (e.g. fallen electrical lines as a result of storm damage), who would you contact first? Who else (if anyone) would you contact?

Rotate start order.

- I would check who is best to contact using an online search
- Ring the ESB emergency line
- Ring my local authority (e.g., county council)
- Ask someone else to report the incident

Quantitative Survey Questionnaire



- e) Ring the emergency services (i.e. 999 or 112)
- f) Ring a family member or friend and ask what to do
- g) Other
 - o Please specify _____
- None [Only show in second round]

ASK IF ANSWERED (B) to Q18, Q19 AND/OR Q20

RECORD FIRST MENTIONS AND OTHER MENTIONS.

Q21. How would you most likely find the appropriate phone number to contact <insert organisation>? Single code for supply used <q18,19,20>. How else are you likely to find this number?
Rotate list.

- a) I would check online (e.g., via a search engine or on the relevant provider's website)
- b) I would check a recent utility bill
- c) I have the number saved on my phone (either mobile or landline)
- d) I have the number written down at home (e.g., on a sticker, pinboard or fridge)
- e) I would find a physical asset to see if there is a number on it (e.g., electricity pole, water station, gas pipe)
- f) I would phone a friend/family member to ask for the number
- g) I would find the nearest house/business and ask
- h) Other
 - o Please Specify _____
- None [Only show in second round]

Q22. In the event of an incident involving gas/water/electricity outside your home and you could not get through to the utility supplier and there is no recorded message what would you do? **Single code for Gas, Electricity and Water.**

		Gas	Electricity	Water
A	Call a different emergency service or agency (e.g. fire brigade/Gardai/property management company)			
B	Keep trying the same number – it's probably a temporary glitch			
C	Wait and see if the issue gets worse and then try again			
D	Look for an alternative emergency number for the relevant utility			
E	Ring a family member or friend for advice			

F	Look for a different contact number on a utility bill			
G	Contact relevant utility via alternative channel e.g., webchat, SMS, social media or email			
H	Contact Directory Enquires for an alternative number			
I	Nothing/give up			
J	Other (please describe)			

ASK IF ANSWERED (D) to Q22 RECORD SEPERATELY FOR EACH D OPTION SELECTED.

Q23a. Where would you look for an alternative number to call the utility provider regarding the <INSERT SERVICE> incident?

- a) A utility bill I have at home
- b) A meter or asset that I have at home e.g. a sticker on a boiler
- c) The internet
- d) A sticker I have at home
- e) Ask a friend or neighbour
- f) Other (please describe)

ASK IF ANSWERED (B) or (C) to Q22

Q23b. How many times do you estimate you would re-dial the same number and try again <FOR GAS> <FOR WATER> <FOR ELECTRICITY>?

- Once
- 2-3 times
- 3-4 times
- 5-9 times
- 10+ times
- Don't Know

ASK IF ANSWERED (B) or (C) to Q22

Q23c. How long would you leave it before calling again IN RELATION TO <GAS><ELECTRICITY><WATER> ?

- a) A few minutes
- b) A few hours
- c) The following day
- d) The following week
- e) Other (please describe)

Quantitative Survey Questionnaire



ASK ALL

Q24. When thinking about reporting an incident to a gas/water/electric company have you avoided or would you avoid calling a non-geographic number for fear of call charges i.e. incurring additional charges on your phone bill?

- Yes/No/Don't Know

RESEARCH
EVALUATION
DIRECTION
CLARITY

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