2012 Massachusetts Statewide Marketing Campaign Evaluation Report

Final

Prepared for:

MASSACHUSETTS PROGRAM ADMINISTRATORS

MASSACHUSETTS ENERGY EFFICIENCY ADVISORY COUNCIL

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1. EXECUTIVE SUMMARY

This report presents results from the post 2012 statewide umbrella marketing survey effort conducted by Opinion Dynamics. During 2012, the Massachusetts-based energy efficiency Program Administrators (PAs) implemented the fourth year of this marketing effort, under the trademark of Mass Save®. The goal of the research presented in this report is to document changes in awareness of Mass Save over time.

To support the assessment of pre- and post-campaign awareness, Opinion Dynamics fielded telephone surveys with a sample of residential and commercial and industrial (C&I) target audiences. We fielded the surveys immediately after the conclusion of the 2012 campaign, which ran from April 2, 2012, to August 19, 2012. In total, we spoke with 402 residential customers and 295 C&I customers from around the state.

In general, the 2012 Mass Save Statewide Campaign focused on communicating what Mass Save is and what it means to Massachusetts residents and businesses. In pursuing that goal, the sponsors created a unified campaign with consistent messaging, look and feel for the residential and commercial sectors as a whole. Additionally, the sponsors worked to consolidate the campaign so that it would have a strong presence in the market for a specific period of time as opposed to having a varied presence throughout the year. In short, the campaign moved away from the sector and program-specific tactics employed in 2011 and renewed its emphasis on raising overall Mass Save awareness.

Post-2012 Campaign Awareness

Overall, the team found divergent results within the residential and C&I populations, with C&I customers showing greater changes in awareness and other metrics over time. These increases among businesses suggest that the ramp-up of Mass Save Statewide Campaign efforts targeted to C&I customers is beginning to have an effect. Detailed findings from the post-campaign survey include the following:

C&I Customers

- There has been a significant increase in Mass Save awareness among C&I customers over awareness prior to the 2012 campaign launch. While awareness of Mass Save remains moderate among C&I customers, the August 2012 survey shows that awareness has risen from 33% pre-campaign to 40% post-campaign.

- There has also been a significant increase in the percentage of C&I customers who most associate Mass Save with a website (Pre – 6%, Post – 39%), as well as those who are aware of MassSave.com (Pre – 51%, Post – 61%). These findings demonstrate the campaign's success in educating this sector on the existence of MassSave.com, an integral component of the Mass Save campaign and associated resources.

Residential Customers

- Awareness of and familiarity with Mass Save have not changed significantly among residential PA customers since the pre-campaign survey. In addition, there has been little change in familiarity compared to the 2010 baseline study conducted by the campaign implementer. While the 2010 results indicate that 18% of residential customers reported being “very” or “somewhat” familiar with the term “Mass Save,” this figure is not significantly different (21%) in the post-campaign survey period.

- In contrast, there has been a significant increase in the percentage of residential respondents who mention Mass Save as an entity promoting energy efficiency after the 2012 campaign compared to before its launch (Pre – 4%, Post – 7%).

2. INTRODUCTION

This report presents results from the post-2012 statewide umbrella marketing survey effort conducted by Opinion Dynamics. The primary goal of this research is to enable the PAs to track changes in Mass Save awareness over time. As such, this report presents the results from residential and C&I quantitative surveys conducted immediately following the 2012 campaign, which ran from April 2 to August 19, 2012.

2012 Campaign Overview

In 2012, the Mass Save Statewide Campaign changed tactics. The campaign sponsors moved away from the seasonally appropriate program-specific messaging of 2011 and consolidated the campaign in order to maintain a consistent and discernible presence in the market. During 2012, the residential and commercial campaigns were also unified to create a single look and feel for the campaign, and also to facilitate the use of a common message platform.

Overall, the 2012 campaign was designed with the program's three key goals in mind:

- Educate audiences about the need for and benefits of energy efficiency;
- Increase awareness of Mass Save, and;
- Drive Massachusetts residents to participate in sponsored energy efficiency programs.[1]

To address these goals, the 2012 campaign employed a range of tactics, including radio, transit advertising, banner ads, and Google ads and keywords.[2] Google advertising in particular was new to the campaign and these advertisements were designed to highlight Mass Save only as opposed to specific energy saving programs. Further, the sponsor's changed their approach for key word buys in order to reduce redundancy and competition between Mass Save and the various PAs in the state.

With these goals and the campaign plan as a foundation, it is important to note that throughout the campaign period, as well as leading up to the April launch, individual PAs and program collaborative were in the market with various types of program advertising. During this time, other entities also branded programs with Mass Save, which may contribute to program related associations.

Evaluation Approach

Table 2-1 below provides a synopsis of the data collection efforts implemented to support the post campaign assessment of awareness. The team conducted tests of statistical significance to ensure that the two groups of survey respondents were comparable. In addition, based on the sample sizes for this effort, the team could detect a change in Mass Save awareness of 6 percentage points for residential and 7 percentage points for C&I both at 90% confidence and 10% precision.

Additional details regarding the methodology used for this assessment are provided in Section 3.

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[1] The Cadmus Group, Inc. / Energy Services. "Massachusetts Statewide Education, Marketing and Outreach Working Coalition – RFP 306. January 29, 2010.

[2] The Cadmus Group, Inc. / Energy Services. "2012 Statewide Marketing Campaign Presentation".

Table 2-1. Overview of Evaluation Activities

<table>
<tr><th>Evaluation Task</th><th>Pre Survey</th><th>Post Survey</th><th>Details</th></tr>
<tr><td>C&I Quantitative Survey</td><td>314</td><td>295</td><td rowspan="2">Provides information on awareness of and familiarity with Mass Save, exposure to Mass Save marketing efforts, and the influence of Mass Save marketing on knowledge of and participation in PA programs.</td></tr>
<tr><td>General Population Quantitative Survey</td><td>401</td><td>402</td></tr>
</table>

Appendix C contains highlights from the pre-campaign baseline survey.

3. METHODOLOGY

Immediately following the 2012 Umbrella Marketing Campaign, the team conducted telephone surveys with a sample of residential and commercial customers in Massachusetts. As outlined below, these survey efforts were consistent with those fielded prior to the campaign's launch. The following sections outline the sampling approach used for each survey effort.

Residential General Population Survey

We conducted a telephone survey with a random sample of 402 residential PA customers. The survey was designed to assess changes in residential awareness of Mass Save, as well as exposure to Mass Save marketing efforts. We fielded the survey between August 20 and September 9, 2012, immediately following the conclusion of the 2012 marketing campaign.

We based the sample of customers on files that the PAs provided to the Residential Retrofit Evaluation Team, which merged PA Customer Information System (CIS) data with program tracking databases to develop a master file of all PA residential customers. The Umbrella Marketing Evaluation Team used the merged customer database to create a sample frame containing all unique residential accounts with valid contact information. From this frame, we drew a random sample and set survey quotas for each PA combination (Table 3-1) in proportion to their representation in the overall population to ensure that the sample was representative of the overall customer base. We also de-duped this list to account for customers called during the pre-campaign survey effort.

The total number of interviews, shown in Table 3-1, provides results at 90% confidence and 4% precision at the statewide level. Further, we compared the respondents to the post-campaign survey with those who participated in the pre-campaign survey and found no statistically significant differences between the groups.

Table 3-1. General Population Survey Sample Approach

Residential Customers[a]	Sample Frame		Sample		Completed Interviews	
	#	%	#	%	#	%
Bay State Gas-NGRID	6,851	0.3%	46	<1%	1	<1%
Bay State Gas-NSTAR	2,021	0.1%	13	<1%	0	<1%
Bay State Gas-WMECO	3,390	0.2%	14	<1%	1	<1%
Bay State Gas	25,152	1.2%	134	1%	4	1%
Berkshire-NGRID	2,849	0.1%	12	<1%	0	<1%
Berkshire	9,797	0.4%	56	<1%	1	<1%
Berkshire-WMECO	9,762	0.4%	49	<1%	2	<1%
WMECO	142,004	6.5%	738	6%	27	7%
CLC-NGRID	42,101	1.9%	243	2%	8	2%
CLC	132,436	6.1%	689	6%	22	5%
NGRID-New England Gas	15,749	0.7%	79	1%	3	1%
NSTAR-New England Gas	1,269	0.1%	7	<1%	0	<1%
NGRID-Unitil	505	0.0%	5	<1%	0	<1%

Residential Customers[a]	Sample Frame		Sample		Completed Interviews	
Unitil	27,616	1.3%	161	1%	4	1%
NGRID-NSTAR	182,019	8.4%	1,018	8%	35	9%
NGRID	954,319	43.8%	5,304	44%	177	44%
NSTAR	599,308	27.5%	3,319	28%	116	29%
New England Gas	22,375	1.0%	101	1%	2	<1%
Total	**2,179,523**	**100%**	**11,988**	**100%**	**402**	**100%**

[a] This column captures the PAs serving various Massachusetts customers. As shown here, some customers receive services from both National Grid and New England Gas for example.

The table below shows the final survey dispositions of the telephone numbers in the sample. We calculated the survey response rate using the standards and formulas set forth by the American Association for Public Opinion Research (AAPOR).[3]

[3] *Standard Definitions: Final Dispositions of Case Codes and Outcome Rates for Surveys*, AAPOR, 2009. http://www.aapor.org/Standard_Definitions/2852.htm.

Table 3-2. Disposition of Targeted Residential Customers

Disposition	N
Completed Interviews (I)	403[a]
Eligible Non-Interviews	5,976
Refusals (R)	2,860
Telephone Answering Device (NC)	2,130
Mid-Interview terminate (R)	154
Respondent never available (NC)	705
Language Problem (NC)	127
Not Eligible (e)	2,764
Fax/Data Line	92
Non-Working	2,108
Wrong Number	321
Business/Government	220
No Eligible Respondent	11
Duplicate Number	12
Unknown Eligibility Non-Interview (U)	2,845
Not dialed/worked	209
No Answer	2,553
Busy	37
Call Blocking	46
Total Participants in Sample	**11,988**

[a] Note that this number differs from the total number of interviews cited throughout the report as one respondent from the pre-test was dropped from the analysis.

The following table provides the response and cooperation rates, which are consistent with the pre-campaign survey.[4]

Table 3-3. Residential Survey Response and Cooperation Rates

AAPOR Rate	Percentage
Response Rate (RR3)	4%
Cooperation Rate	12%

As previously indicated, the team leveraged existing PA customer lists available through the Residential Retrofit Evaluation Team for the survey sample. This sample previously yielded a response rate of 4% for the 2011 non-participant panel study effort. As such, this was the expected response rate from the sample. As part of the initial effort, the team also had to complete fielding of the survey within a short timeframe in order to obtain data prior to the launch of the 2012 campaign. A longer timeframe (allowing from more calling on the same sample) can sometimes result in better response rates.

Weighting

Similar to the pre-campaign survey, we developed and applied weights to the telephone survey data to match the composition of customers within the Massachusetts population based on home ownership. Table 3-4 shows the weights for the telephone survey data, which differ slightly from those applied to the pre-campaign survey.

Table 3-4. General Population Survey Weighting

	Massachusetts Population	Unweighted Gen Pop Data	Home Weight
	%	%	
Own	62%	79%	0.7905
Rent	38%	21%	1.7749

Commercial & Industrial Customer Survey

Opinion Dynamics conducted a telephone survey among PA business customers to assess changes in awareness, familiarity, and associations with Mass Save. Our team surveyed a simple random sample of 295 PA C&I customers in August and September 2012. We timed the fielding of the survey to take place immediately following the 2012 marketing campaign.

[4] The team had to complete fielding of the survey within a short timeframe in order to obtain data prior to the launch of the 2012 campaign. A longer timeframe (allowing from more calling on the same sample) can sometimes result in better response rates; however, given the short timeframe, we had to estimate the response rate for the sample and load enough sample to complete calling in the time allocated.

We based the sample of C&I customers on three data sources: files that the PAs provided to the Non-Residential Small Business Evaluation Team in 2010, data provided by the PAs to the Non-Residential Large C&I Evaluation Team in 2012, and Cape Light Compact ("CLC") customer data provided to the Cross-Cutting Evaluation team in 2012. The team initially believed that the 2012 non-CLC data files would contain sufficient PA data to serve as the sample frame for the entire survey effort. However, upon closer review, the team determined that there was insufficient data for some PAs.[5] As a result, we established the sample frame using both the 2010 and 2012 data files.

Table 3-5. C&I Sample Design

C&I Customers	Population [a]	Sample Frame	Sample	Completed Interviews
Total	231,028	20,000	16,952	295

[a] Population figures are based on unique account numbers, whereas the sample frame is the number of unique and valid phone numbers.

The following table shows the final survey dispositions of the telephone numbers in the sample. We calculated the survey response rate using the standards and formulas set forth by the American Association for Public Opinion Research (AAPOR).[6]

[5] The team used 2010 data for Berkshire Gas, Unitil, and WMECO.

[6] Ibid.

Table 3-6. Disposition of Targeted C&I Customers

Disposition	N
Completed Interviews (I)	295
Eligible Non-Interviews	8,764
Refusals (R)	3,836
Mid-Interview terminate (R)	80
Telephone Answering Device (NC)	3,101
Respondent never available (NC)	1,599
Language Problem (NC)	148
Not Eligible (e)	3,641
Fax/Data Line	216
Non-Working	2,150
Wrong Number	310
Business/Government	900
No Eligible Respondent	57
Duplicate Number	8
Unknown Eligibility Non-Interview (U)	3,652
Not dialed/worked	870
No Answer	2,734
Busy	29
Call Blocking	19
Total Participants in Sample	**16,952**

The following table provides the response and cooperation rates, which are consistent with the pre-campaign survey.

Table 3-7. C&I Survey Response and Cooperation Rates

AAPOR Rate	Percentage
Response Rate (RR3)	2%
Cooperation Rate	7%

Weighting

Given the lack of readily available population-level data on Massachusetts businesses, the evaluation team conducted an unweighted analysis of the commercial survey data.

4. Post-Campaign Survey Findings

The following section of the report presents results from the residential and commercial surveys conducted in August and September 2012, with a focus on significant differences between the pre- and post-campaign surveys.

4.1 Campaign Knowledge and Awareness

4.1.1 General Mass Save Awareness

A comparison of results from the pre- and post-campaign surveys indicates that there have been some changes in Mass Save awareness or familiarity as a result of 2012 campaign activities. However, there are differing results within the residential and commercial populations. The following are key findings related to Mass Save awareness:

- There has been a significant increase in Mass Save awareness among C&I customers over awareness prior to the 2012 campaign launch. While awareness of Mass Save remains moderate among C&I customers, the August 2012 survey shows that awareness has risen from 33% in the pre-campaign period to 40% in the post-campaign period, (Figure 4-2).

- Familiarity with Mass Save has remained moderate among those aware of Mass Save for both residential and C&I customers: of those aware of the campaign, half consider themselves at least somewhat familiar (Residential: Pre – 49%, Post – 49%; C&I: Pre – 48%, Post – 47%).[7] When compared to the 2010 baseline study conducted by the campaign implementer,[8] there is little change in overall levels of familiarity. For example, the 2010 results indicate that 18% of residential customers reported being "very" or "somewhat" familiar with the term "Mass Save." This figure is 21% in the post-campaign survey period.

- Awareness of Mass Save continues to exceed that of other statewide or regional PA programs and brand names, such as Gas Networks and COOL SMART (Figure 4-1 and Figure 4-2). However, customers have the greatest levels of awareness around incentive or rebate programs offered by the PAs.

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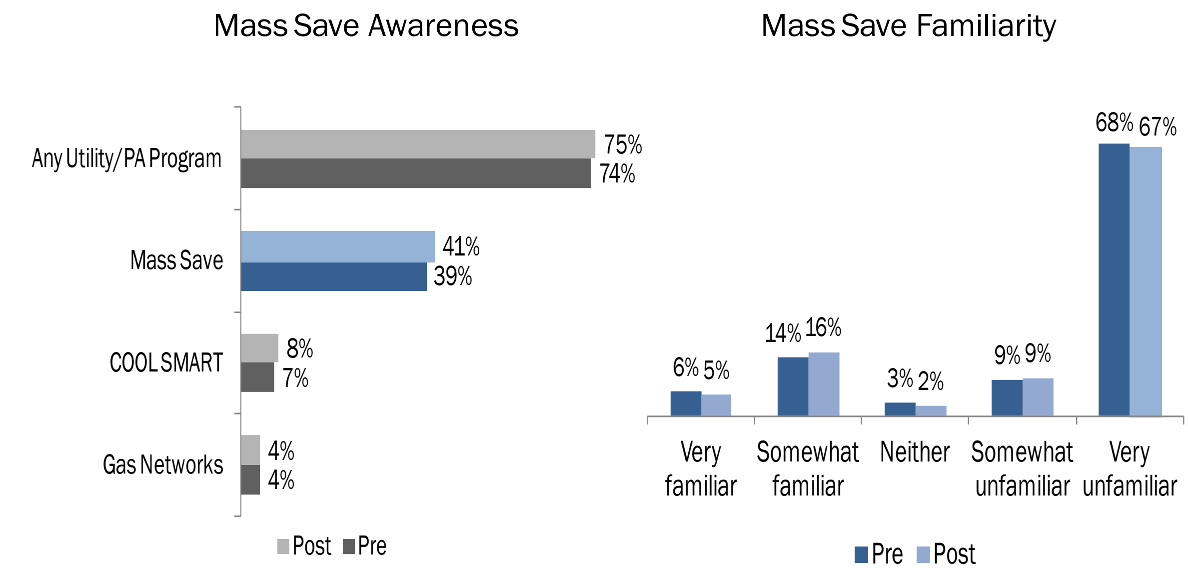
[7] Responses include "very familiar" and "somewhat familiar." Those respondents who were not aware of Mass Save are considered "very unfamiliar".

[8] The Massachusetts Statewide Residential Energy Efficiency Survey, was conducted by the Shelton Group, and was completed by 400 randomly selected respondents who indicated that they were responsible for utility bill payments and decisions about home improvements.

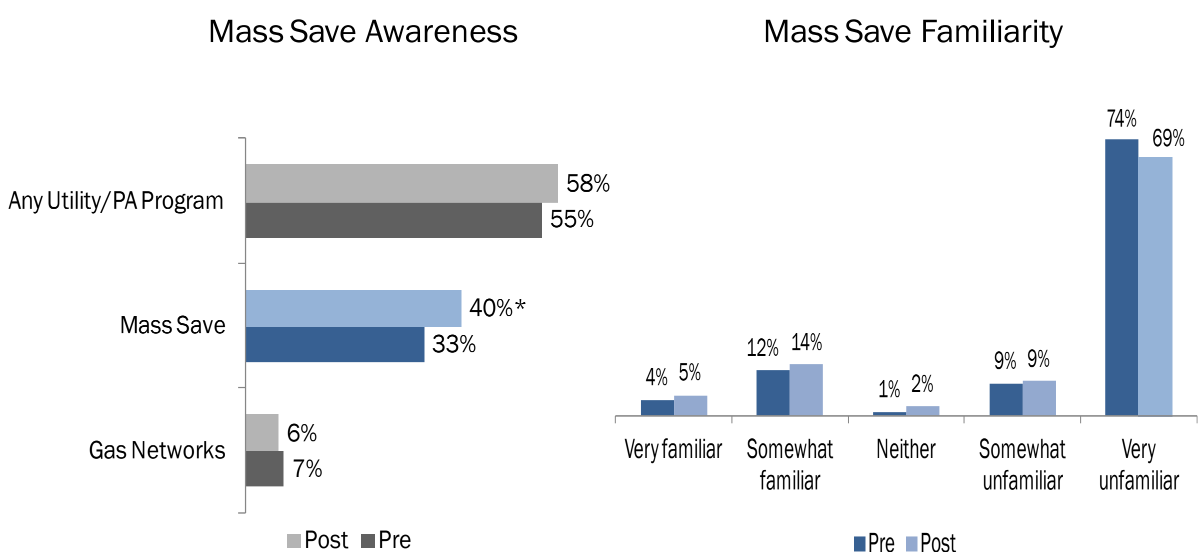
Figure 4-1. General Program Awareness and Mass Save Familiarity among Residential Customers



Pre n=401 Post n=402

Note: Respondents who are not aware of Mass Save are considered “very unfamiliar.”
Percentages may not sum to 100% due to rounding.

Figure 4-2. General Program Awareness and Mass Save Familiarity among C&I Customers



Pre n=314 Post n=295

*Significant at the 90% level
Note: Respondents who are not aware of Mass Save are considered “very unfamiliar.”
Percentages may not sum to 100% due to rounding.

Survey findings also indicate that there has been a slight increase in the percentage of all business customers who believe Mass Save offers solutions for both their home and business (Pre – 16%, Post – 19%).

4.1.2 Knowledge and Perceptions of Mass Save

Campaign Associations

PA customers continue to associate the campaign with energy at the same levels as they did prior to the 2012 campaign. Table 4-1 illustrates the frequency with which respondents mention energy and energy efficiency items when discussing (unaided) what they associate with Mass Save. When asked a follow-up question as to whether they associate Mass Save with energy, a strong majority of residential (Pre – 87%, Post – 83%) and C&I participants (Pre – 96%. Post – 92%) respond affirmatively.

Strikingly, the post-campaign survey shows a significant increase in the percentage of residential customers who associate Mass Save with an energy assessment or audit (Pre – 17%, Post – 26%) unaided. This may be the result of both lingering associations with the Home Energy Assessment Program formerly called the Mass Save Program, as well as the branding of energy saving programs as Mass Save programs in 2012 (e.g. the *Mass Save* Home Energy Assessment Program).

Table 4-1. Customer Associations with Mass Save among Those Aware (Multiple Response; Unaided)

Associated with Mass Save	Residential		C&I	
	Pre	Post	Pre	Post
	(n=180)	(n=175)	(n=105)	(n=119)
Energy efficiency and reducing energy bills	21%	17%	22%	18%
Energy assessment or audit	17%	26%*	21%	16%
Resource for energy information	13%	10%	7%	8%
Energy saving programs/home improvements	12%	3%*		5%
Rebates/saving money general	12%	8%	11%	13%
Related concepts (i.e., recycling, energy)	9%	8%	7%	13%
Rebates/incentives for appliances	8%	3%*		
Utility/Energy Efficiency Service Provider	8%	4%**	9%	6%
Rebates/incentives for insulation	6%	4%		2%
Rebates/incentives for lighting/controls	5%	4%	5%	6%
State government	5%	2%	5%	4%
Rebates/incentives for HVAC equipment	5%	1%**	2%	3%
Negative association with Mass Save	3%	1%		
Advertisements	1%	1%	4%	1%
Website	1%		1%	
Rebates/incentives for Custom projects			1%	1%
(Other)	8%		3%	5%
(Don't know)	14%	23%*	14%	16%

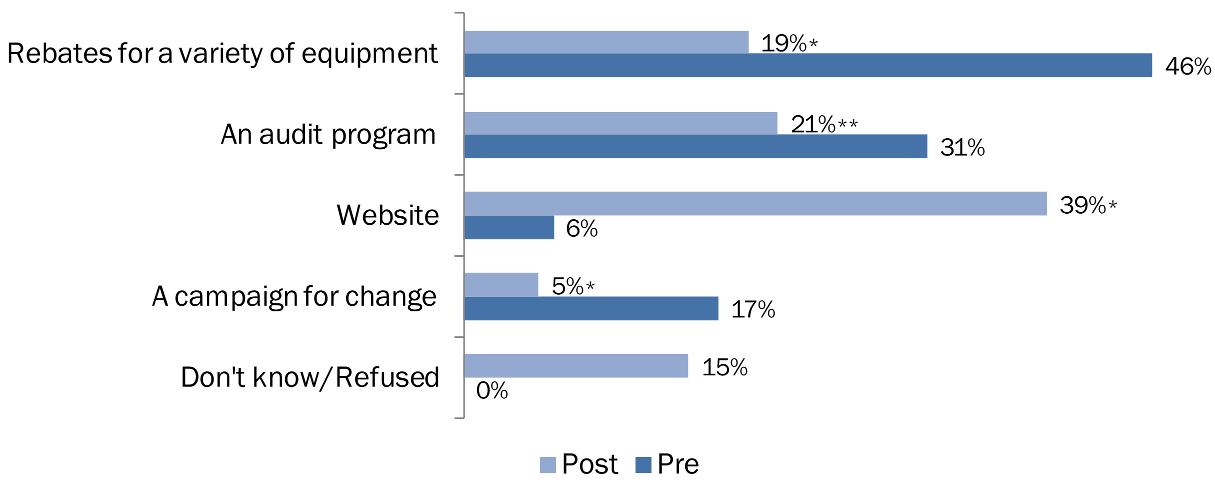
Note: All responses are unaided and therefore cells that do not contain percentages indicate a lack of customer responses in that category.

* Significant at the 95% level.

** Significant at the 90% level.

However, when provided a list of basic program features and asked which one they most associate with Mass Save, residential customers continue to *most* associate Mass Save with “a resource for energy efficiency information and programs” (Pre – 46%, Post – 48%) followed by “rebates for a variety of equipment” (Pre – 20%, Post – 23%). Overall, few residential customers most associate Mass Save with an audit program (Pre – 15%, Post – 12%). The results from both the unaided and aided questions on association indicate that a minority of residential customers still associate Mass Save with energy audits, but it is not their strongest association.

Figure 4-3. Aided Association among Commercial and Industrial Customers Aware of Mass Save



Pre n=105	Post n=119

Note: Percentages may not sum to 100% due to rounding.

In contrast, as seen in Figure 4-3 there are a number of changes in C&I customer perceptions of Mass Save. Most importantly, there has been a significant increase in the percentage of C&I customers who most associate Mass Save with a website (Pre – 6%, Post – 39%). This finding demonstrates the campaign’s success in educating this sector on the existence of MassSave.com, an integral component of the Mass Save campaign and associated resources.

Sponsorship of Mass Save

There has been no change between the Pre and Post survey with regard to perceived Mass Save sponsorship. As illustrated in Table 4-2, both residential and commercial customers aware of Mass Save overwhelmingly think of it as a utility or energy efficiency service provider effort (Res Pre – 52%, Res Post – 44%, C&I Pre – 53%, C&I Post – 54%), while approximately one-third (Res & C&I Pre – 28%, Res Post – 37%, C&I Post – 33%) of all customers cannot name any organizations they think sponsored Mass Save.

Table 4-2. Perceived Sponsorship of Mass Save among Those Aware of the Effort (Multiple Response; Unaided)

Perceived Sponsoring Organizations	Residential	C&I

	Pre (n=180)	Post (n=174)	Pre (n=105)	Post (n=119)
Utility(ies) or Energy Efficiency Service Provider	51%	44%	53%	54%
State government	9%	6%	10%	7%
Government/politicians/political parties	5%	4%		
Environmental non-profits or NGOs	4%	2%	4%	5%
Retailers/manufacturers (i.e., GE, local businesses)	3%	2%	-	3%
Federal government (i.e., Dept of Energy)	2%	2%	-	3%
(Other)	8%	6%	7%	2%
(Don't know)	28%	37%*	28%	33%

* Significant at the 90% level.

Aided Awareness and Perceptions

In both the pre and post surveys, awareness of Mass Save rose substantially among C&I respondents after Mass Save was described.[9] However, there are no significant differences between pre and post survey responses on this question.

As shown in the following Table 4-3, the difference between aided and unaided awareness among residential customers is much smaller : approximately the same percentage of respondents (Pre – 39%, Post – 41%) recall the term before it is explained as say they are aware of it after it has been described (Pre – 40%, Post – 40%).[10]

9 After an unaided exploration of Mass Save awareness and familiarity, we described Mass Save to the participants and asked them a series of additional questions about the campaign. The team provided the following description: *Mass Save is a statewide energy efficiency partnership between utilities, energy efficiency service providers and the state of Massachusetts to provide programs for ALL Massachusetts homes and businesses to save energy. These programs include rebates for lighting and appliances that are energy efficient, and rebates and incentives for upgrading your heating or cooling systems to systems that use less energy.*

10 The results presented here differ from the draft report due to weighting of the residential survey data. When unweighted, awareness declined after residential customers were read a description of Mass Save (from 45% to 43%).

Table 4-3. Aided versus Unaided Awareness of Mass Save

Aware of Mass Save	Residential				C&I			
	Pre		Post		Pre		Post	
	(n=401)		(n=402)		(n=314)		(n=295)	
	Unaided	Aided	Unaided	Aided	Unaided	Aided	Unaided	Aided
Yes	39%	40%	41%	40%	33%	47%	33%	48%
No	57%	59%	56%	57%	66%	53%	66%	51%
Don’t Know / Refused	3%	2%	3%	3%	1%	-	1%	1%

Note: Percentages may not sum to 100% due to rounding.

In general, the majority of respondents also continue to report a favorable opinion of the campaign based on the description; most residential respondents (Pre – 84%, Post – 80%) and C&I respondents (Pre 75%, Post – 75%) report having either a *somewhat* or *very favorable* opinion of Mass Save (Table 4-4).

Table 4-4. Opinion of Mass Save after Program Description

Opinion of Mass Save	Residential		C&I	
	Pre	Post	Pre	Post
	(n=401)	(n=402)	(n=314)	(n=295)
Very favorable	35%	40%	29%	26%
Somewhat favorable	49%	40%*	46%	49%
Somewhat unfavorable	2%	3%	3%	4%
Very unfavorable	1%	2%	3%	2%
Don't know/ Refused	13%	16%	20%	19%

Note: Percentages may not sum to 100% due to rounding.

* Significant at the 95% level.

Overall, those factors driving favorable opinions of Mass Save have not changed since the implementation of the 2012 campaign. Further, among residential respondents, positive feelings about saving energy (Pre – 27%, Post – 25%) and money (Pre – 22%, Post – 18%), positive feelings about the program in general (Pre – 22%, Post – 24%), positive past experience with this or similar programs (Pre – 9%, Post – 8%), and positive feelings about educating/informing the public (Pre – 8%, Post – 10%) are the top reasons cited by residential respondents as to why they have a favorable opinion. As shown in the following Table 4-5, business customers also share these sentiments.

Table 4-5. Reasons for Opinion of Mass Save among Those who Offered One (Multiple Response)

Reasons	Residential		C&I	
	Pre	Post	Pre	Post
	(n=347)	(n=339)	(n=252)	(n=239)
Positive				
Positive feelings about saving energy	27%	25%	18%	23%
Positive feelings about saving money	22%	18%	28%	22%
Positive feelings about program in general	22%	24%	24%	16%
Past experience – positive	9%	8%	11%	8%
Positive feelings about educating/informing the public	8%	10%		7%
Positive feelings about helping improve homes and businesses	7%	3%*		10%
Positive feelings about helping those in need	5%	4%	5%	4%
Positive feelings about protecting the environment	4%	7%	5%	7%
Negative				
Limited awareness of programs and services	18%	8%*	15%	11%
Negative feelings/experience	17%	11%	16%	18%
Neutral/Other				
No real feelings about it	1%	2%	2%	1%
Other	2%	3%	2%	2%
Don't know	5%	6%	8%	6%

* Significant at the 90% level.

Note: We did not ask this question of those who did not provide an opinion of Mass Save. In addition, all responses are unaided and therefore cells that do not contain percentages indicate a lack of customer responses in that category.

4.1.3 Awareness and Use of MassSave.com

The post-campaign survey indicates that website awareness increased among C&I respondents by 10%. This finding is closely related to C&I customer associations as shown above in Figure 4-3, which describes how there has been a large increase in C&I customers who associate Mass Save with a resource website.

Table 4-6. MassSave.com Awareness among those Aware of Mass Save

	Residential		C&I	
	Pre	Post	Pre	Post
	(n=167)	(n=174)	(n=105)	(n=120)
Aware	42%	41%	51%	61%*

* Significant at the 90% level.

As shown in Table 4-7 below, among both residential and C&I customers, there has been an increase in the number of customers who have used the Mass Save website once in the last six months. However, a significantly smaller percentage of C&I customers are using the website more than once a month compared to before the 2012 campaign.

Table 4-7. MassSave.com Usage in Past 6 months

Website Visits	Residential		C&I	
	Pre	Post	Pre	Post
	(n=70)	(n=72)	(n=54)	(n=49)
None	63%	68%	63%	61%
Once	15%	19%	13%	20%
2-5 times	19%	10%	24%	10%*
6-10 times	-	2%	-	4%
11 or more	2%	1%	-	-
Don't know	-	-	-	4%

* Significant at the 90% level.

4.2 Exposure to Mass Save Marketing

In general, the percentage of C&I customers reporting exposure to any campaign channel has significantly increased. However, there are no statistically significant differences between the level of exposure by channel before and after the 2012 campaign (see Table 4-8). This illustrates that there is no one channel driving the campaign. Instead exposure has increased a little in each of the channels. Sector specific results include:

- The percentage of residential and C&I customers reporting exposure generally (i.e., to any campaign channel) in the past six months has increased significantly from before the campaign.
- Among residential customers, bill inserts (Pre – 13%, Post – 11%), a separate mailer (Pre – 9%, Post – 11%), print ads (Pre – 7%, Post – 7%), radio advertisements (Pre – 7%, Post – 10%), and Mass Save.com (Pre – 4%, Post – 6%) are still the most common ways that people hear about Mass Save.
- For C&I respondents, radio advertisements are the most frequent source of information (Pre – 9%, Post – 10%), followed by mailers (Pre – 7%, Post – 9%), Mass Save.com (Pre – 6%, Post – 8%), bill inserts (Pre – 6%, Post – 9%), newspaper articles (Pre – 5%, Post – 4%), and print advertisements (Pre – 5%, Post – 7%).[11]

[11] We asked C&I respondents to think specifically about places where they may have heard about how to save energy at their business.

Table 4-8. Market Channel Exposure within the Last 6 Months (Multiple Response)

Campaign Channel	Residential		C&I	
	Pre	Post	Pre	Post
	(n=401)	(n=402)	(n=314)	(n=295)
Any Channel – Ever[a]	38%	41%	30%	37%*
Any Channel – Past 6 Months[a]	26%	31%*	23%	30%*
Bill Insert	13%	11%	6%	9%
Mailer	9%	11%	7%	9%
Print Ad	7%	7%	5%	7%
Radio Ad	7%	10%	9%	10%
MassSave.com	4%	6%	6%	8%
Newspaper Article	4%	6%	5%	4%
Mass Transit	3%	5%		
Billboard	3%	5%		
Online Ad	3%	4%	3%	3%
Email	2%	2%		
Public Event	1%	1%	1%	3%
Case Study			2%	3%

[a] The pre survey values have been adjusted since the last report to include respondents who indicate exposure to MassSave.com via other survey questions.

*Significant at the 95% level.

Note: Cells do not contain percentages in instances where respondents were not asked about a particular channel.

4.3 Mass Save Influence on Program Knowledge and Participation

As expected, given the campaign's initial focus on awareness of Mass Save, the campaign is not yet a key driver of program participation. There has been no significant increase in the number of residential customers who report having participated in a PA program within the past year (10% of all Pre respondents, 12% of Post). Few respondents say they had participated in Mass Save after having viewed Mass Save advertisements (Pre – 4%, Post – 3%).

Table 4-9. Residential Knowledge of PA Programs Due to Mass Save Marketing

Awareness Component	Pre (n=401)	Post (n=402)
Aware of PA programs [a]	74%	75%
Aware of Mass Save	39%	41%
Exposed to *any* Mass Save marketing in the past 6 months	26%	31%*
Participated in a PA program within the past year	10%	12%
Participated after seeing Mass Save advertisements	4%	3%

* Significant at the 95% level.

[a] Based on the question: "Are you aware that ...Rebates and incentives from your utility or energy efficiency service provider for energy efficient appliances or for making home improvements are available?"

As shown in Table 4-10, the level of C&I awareness of PA programs, as well as exposure to Mass Save marketing, has increased since the launch of the 2012 campaign, though participation has stayed the same. Few report that they have learned about specific PA programs through Mass Save advertising.

Table 4-10. C&I Knowledge of PA Programs Due to Mass Save Marketing

Awareness Component	Pre (n=314)	Post (n=295)
Aware of PA programs	55%	58%
Aware of Mass Save	33%	40%*
Exposed to *any* Mass Save marketing in the past 6 months	23%	30%*
Participated in a PA program	25%	28%
Heard about programs via Mass Save Advertisements	7%	5%

*Significant at a 90% level.

These findings indicate that Mass Save is not yet a key driver of program participation, though awareness has increased.

4.4 Exposure to Information Sources

4.4.1 Residential Customers

As shown in Table 4-11, residential customers mention a general Internet search most often and far more frequently than any other channel (Pre – 64%, Post – 63%) when asked where they seek energy efficiency information. In addition, although residential customers continue to have limited awareness of the organizations in the market promoting energy efficiency, the post-campaign survey indicates that there has been a significant increase in the percentage of residential respondents who mention Mass Save as an entity promoting energy efficiency (Pre – 4%, Post – 7%).

Table 4-11. Sources Used to Research Energy Efficiency by Residential Customers (Multiple Response; Unaided)

Information Source	Post (n=402)
Internet search (i.e., Google, Yahoo)	63%
Utility/Energy Efficiency Service Provider Website	7%
Newspaper/magazine	2%*
Utility or PA company/utility bill	4%
Friends, family, or colleagues	2%*
Mass Save website	5%

*Significant at the 95% level.

Residential customers continue to report that they are unlikely to call anyone to gather information about how to save energy (Pre – 39%, Post - 32%), and those who would call a telephone number for more information say that they would contact their utility or energy efficiency service provider through an 800 number (Pre – 15%, Post – 17%).

There are also no significant changes in preferred method of receiving information among residential customers: direct mail ranks the most highly (Pre – 43%, Post – 38%), followed by email (Pre – 28%, Post – 33%). Of all residential customers, many (Pre – 12%, Post – 9%) do not want any information about programs.

4.4.2 Commercial and Industrial Customers

When we asked C&I respondents where they would look if they wanted more information about energy efficiency, C&I customers mentioned a general Internet search most often and far more frequently than any other channel (53%) (see Table 4-12). The Mass Save website ranked third (at 9%), though it ranks below Internet search and utility in general (14%).[12]

Table 4-12. Sources Used to Research Energy Efficiency by C&I Customers (Multiple Response; Unaided)

Information Source	Post (n=295)
Internet search (i.e., Google, Yahoo)	53%
Utility/Energy Efficiency Service Provider in General	14%
Mass Save website	9%
State/local/federal government agency or website	4%
Friends/family. coworkers	4%
Trade allies/associations/NGOs	4%
Utility/Energy Efficiency Service Provider Website	3%

*Significant at the 95% level.

[12] These questions were not asked of C&I respondents in the pre survey.

When receiving information about energy efficiency programs, C&I customers prefer email (40%), followed by direct mail (37%). In addition, a small number of C&I customers (8%) do not want any information about energy efficiency programs.

4.5 Survey Respondent Characteristics

The following sections present the characteristics of those PA customers who participated in the 2012 Pre- and Post-Umbrella Marketing surveys.

4.5.1 Residential Customers

Table 4-13 presents the demographics for residential respondents. Where feasible, we also present Massachusetts population data for comparison. As illustrated in the table, there are no significant differences between the customers who respondent to the pre and post surveys.

Table 4-13. Residential Demographics

Demographics	Massachusetts Population [a]	Pre (n=401) [d]		Post (n=402) [d]	
		Unweighted	Weighted	Unweighted	Weighted
Ownership					
Own	62%	72%	61%	76%	60%
Rent	38%	25%	37%	21%	37%
Don't know	-	1%	1%	-	0%
Refused	-	1%	1%	2%	2%
Age					
18 to 24	13%	3%	3%	3%	4%
25 to 34	16%	15%	18%	10%	14%
35 to 44	17%	11%	11%	13%	16%
45 to 64	35%	38%	37%	39%	36%
65 and over	18%	23%	22%	25%	22%
Don't know	-	-	0%	2%	2%
Refused	-	10%	10%	8%	7%
Level of Education [e]					
Less than high school	4%	2%	2%	3%	3%
High school	7%	13%	14%	14%	14%
Some college	27%	20%	21%	24%	23%
Bachelor's degree	19%	29%	29%	26%	27%
Advanced degree	7%	29%	29%	28%	27%
Don't know	21%	0%	0%	-	0%
Refused	14%	6%	6%	5%	5%

Demographics	Massachusetts Population [a]	Pre (n=401) [d]		Post (n=402) [d]	
		Unweighted	Weighted	Unweighted	Weighted
Gender					
Male	48%	55%	55%	49%	49%
Female	52%	45%	45%	51%	51%
Household Income [b]					
Under $30,000	-	13%	15%	11%	14%
$30,000 to under $60,000	-	15%	17%	19%	21%
$60,000 to under $100,000	-	22%	21%	20%	20%
$100,000 or more	-	23%	21%	25%	23%
Don't know	-	2%	2%	4%	4%
Refused	-	25%	24%	20%	19%
Utility [c]					
National Grid	-	49%	49%	40%	45%
NSTAR	-	43%	44%	35%	43%
Columbia Gas	-	7%	7%	4%	4%
WMECO	-	6%	6%	5%	5%
Other	-	7%	7%	8%	10%
Don't know	-	4%	4%	4%	5%
Refused	-	4%	4%	4%	5%

[a] Source: U.S. Census Bureau, 2010 American Community Survey 1-Year Estimates.

[b] Given question wording, a comparison cannot be made with US Census Data.

[c] Note: Multiple response.

[d] Note: Some percentages may not sum to 100% due to rounding.

[e] While survey respondents exhibit higher levels of education than the MA population, the evaluation team found no correlation between education level and awareness of Mass Save.

4.5.2 Commercial & Industrial Customers

Table 4-14 presents the firmographics for the C&I respondents. Similar to the residential effort, there are no significant differences between the respondents to the pre and post surveys.

Table 4-14. C&I Firmographics

Firmographics	Pre (n=314) [a]	Post (n=295) [a]
Ownership		
Owns and occupies this facility	47%	43%
Owns but rented to someone else	4%	6%
Rents this facility	42%	46%
Don't know	4%	2%
Refused	3%	3%
Natural Gas		
Yes	59%	56%
No	32%	34%
Don't know	9%	8%
Refused	1%	2%
Business Type		
Retail/service	11%	17%
Restaurant or food service	10%	9%
Health care or hospital	8%	5%
Industrial or manufacturing	8%	6%
Office sales, bank, law firm, etc.	8%	7%
Automotive/transportation/gas station	8%	6%
Religious/non-profit organization	7%	8%
Property management agency	6%	5%
Other	33%	32%
Refused	1%	2%
Account Manager		
Yes	16%	13%
No	73%	68%
Don't know	9%	14%
Refused	1%	2%
Employees		
1-10	60%	65%
11-25	15%	20%

Firmographics	Pre (n=314) [a]	Post (n=295) [a]
26-50	9%	5%
51-100	4%	3%
101-500	4%	1%
More than 500	2%	1%
Don't know	2%	2%
Refused	4%	4%
Square Footage		
Less than 1000 sq ft	6%	7%
1000-2999 sq ft	24%	29%
3000-5999 sq ft	11%	11%
6000-9999 sq ft	6%	4%
10000 sq ft or more	17%	17%
Don't know	32%	28%
Refused	4%	3%
Revenue - 2011		
Under $100,000	16%	14%
$100,000 to under $500,000	19%	24%
$500,000 to under $1 million	11%	14%
$1 million to under $5 million	12%	10%
$5 million to under $10 million	4%	2%
$10 million to $20 million	0%	1%
More than $20 million	4%	2%
Don't know	13%	16%
Refused	20%	17%

[a] Some percentages may not sum to 100% due to rounding.

A. Appendix - Data Collection Instruments

MA UM CI Survey
FINAL 2012-08-19.pc

MA UM Gen Pop
Survey FINAL 2012-0

B. Appendix - Topline Survey Results

Umbrella Marketing
CI Topline FINAL.pdf

General Population
Umbrella Marketing To

C. Appendix - Pre-Campaign Snapshot

Pre-2012 Campaign Awareness

Prior to the launch of the 2012 Massachusetts Umbrella Marketing Campaign, the Opinion Dynamics team conducted interviews with 401 residential customers and 314 Commercial and Industrial (C&I) customers to understand the pre-campaign levels of awareness of Mass Save. The Massachusetts Umbrella Marketing Campaign has been in place since 2010 and PA customers may have been exposed to messaging employed through the 2010 and 2011 campaigns, as well as program marketing. Within this context and as a result of this quantitative research, we have established the following baseline:

- Over one-third (39%) of residential customers have seen or heard the term Mass Save.
  - When we further explored customer awareness, we found that just under half of those aware of Mass Save felt that they really knew about the effort. Among all residential customers, only 6% described themselves as very familiar while 14% said they were somewhat familiar with Mass Save.
  - Awareness of general utility and energy efficiency service provider programs was significantly higher than awareness of Mass Save among the residential population (74% vs. 39%), while Gas Networks and Cool Smart, other statewide and regional PA campaigns had much lower awareness (4% and 7% respectively).
- When respondents were asked about their exposure to the various channels that Mass Save uses for marketing, 22% of all residential respondents reported being exposed to at least one source of information <u>in the past 6 months</u>. Note that this is prior to the 2012 campaign season and therefore reflects past exposure, as well as exposure to other non-statewide marketing efforts.[13] We expect this percentage to rise in the post-campaign survey effort.
- Residential awareness of the MassSave.com website prior to the 2012 campaign season is lower than general awareness of the Mass Save name (17% vs. 39%).
- Overall, residential respondents have a positive opinion of Mass Save after it is described; 84% had a favorable opinion of the effort.
- Among those residential customers who are aware of Mass Save :
  - The majority associate Mass Save with energy (87%) and despite the fact that Mass Save was once a home energy audit program, only 15% still associate the name primarily with an audit program.
  - Residential customers primarily think of Mass Save as a resource for energy efficiency information (46%), or associate it with rebates for equipment (20%).[14]

[13] The team fielded the survey in February 2012.

[14] We asked respondents if they associated Mass Save with a set of specific response categories.

- In general, residential respondents have little knowledge of organizations promoting energy efficiency. While 50% could not name any organizations, among those who could, the most frequently cited were utility companies or energy efficiency service providers (31%). Prior to the 2012 campaign, only 4% of the population mentioned Mass Save as a source of information.

- Many residential respondents also associate Mass Save with utilities and energy efficiency service providers. In fact, more than half of those who are aware of Mass Save think of Mass Save as a PA effort. Another 28% could not name a possible sponsor, while others thought of it as a state or federal government effort (12%).

- Overall, commercial customers had a lower level of Mass Save awareness.

    - Prior to the 2012 campaign, 33% of commercial customers had heard of the term Mass Save (unaided) and 47% reported hearing about it after it was described (aided).

    - While awareness was lower than in the general residential population, those commercial customers who were aware of Mass Save were also more likely to know about the MassSave.com website. In fact, a similar percentage of commercial and residential customers are aware of the website (17%).

    - Overall, 21% of commercial customers reported being exposed to Mass Save advertisements in the past six months.

In addition, our qualitative research provides insight into perceptions of Mass Save among PA customers:

- Focus group research with residential customers suggests that awareness of Mass Save differs across the geographic areas of the state. Comments from focus group participants suggest that this is due to past exposure to and familiarity with the in-home energy audit program, formerly called Mass Save, offered in the PAs around the state.

- Residential customers demonstrate strong support for the concept of Mass Save as a partnership between utilities and state government, and feel that the coordination among these parties helps lend credibility to Mass Save.

- Business customers whom we interviewed exhibited low to moderate awareness of energy efficiency advertising in general, and Mass Save in particular. The customers who spoke with us could describe Mass Save in vague terms and could not describe any specific messaging or exposure to the campaign.