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2013 Massachusetts Statewide Marketing Campaign

Post-Campaign Report

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1. Executive Summary

During 2013, the Massachusetts-based energy efficiency Program Administrators (PAs) implemented the fifth year of a statewide marketing campaign, under the trademark of Mass Save®. This report presents findings from the December 2013 Mass Save statewide marketing assessment conducted by Opinion Dynamics. The purpose of this study is to document the 2013 campaign design and strategy, as well as its impact on customer awareness of Mass Save, as well as its ability to deliver clear and recognizable messages.

Campaign Overview

The PAs selected a new marketing firm, KSV, to implement the Mass Save Statewide Campaign in 2013. The campaign ran from late March through November 2013 and targeted residential, low-income, and C&I customers throughout the state in an effort to increase awareness of Mass Save. As part of this effort, the sponsors strove to explain who and what Mass Save is, as well as what it means. The central message conveyed was that Mass Save can help anyone lower their energy bills.

To reach these goals, the campaign used a mix of digital, radio, print and out-of-home channels to reach customers across the residential and C&I sectors. As part of these efforts, KSV and the PAs made special efforts to ensure that the Mass Save logo and a link to the Mass Save website were included on all visual marketing materials and that a consistent narrative was provided to customers. The sponsors do not plan to make any significant changes for the 2014 campaign, which began in January 2014.

Research Activities

To support the December 2013 post-campaign assessment of Mass Save, Opinion Dynamics reviewed all of the statewide marketing materials used in 2013, as well as each of the PA websites. The team also fielded telephone surveys with a sample of residential and commercial and industrial (C&I) customers. These surveys were fielded immediately after the close of the 2013 campaign in December 2013. In total, the Team spoke with 500 residential customers and 300 C&I customers from around the state.

The surveys constitute the fourth wave of a series of surveys conducted since February 2012. Table 3 summarizes all of the primary data collection performed to date.

Table 1. Summary of Data Collection to Date

Survey Date	Description	Residential Completes	C&I Completes
February 2012	Before the 2012 campaign	401	314
August/September 2012	After the 2012 campaign	402	295
March 2013	Before the 2013 campaign	501	456
December 2013	After the 2013 campaign	500	300

Key Findings

The team provides the following key findings from the study:

- Awareness of Mass Save continues to be moderate. The team did not see any significant change in Mass Save awareness over the 2013 period. However, there has been a significant increase in Mass Save awareness among C&I customers between February 2012 (33%) and December 2013 (45%). Further, awareness of Mass Save has reached moderate levels with 43% of residential customers and 45% of C&I customers reporting that they have seen or heard the term as of December 2013.

- **Awareness of the Mass Save website has increased significantly.** In the December 2013 survey, almost sixty percent of C&I respondents aware of Mass Save also said they knew about the existence of the Mass Save website (59%), which represents a significant increase in awareness levels from February 2012 (51%). Similarly, just over half of the residential respondents aware of Mass Save said they knew of the Mass Save website (56%), which is significantly higher than seen in either of the two 2012 surveys. These increases may be related to the campaign's increasingly consistent inclusion of the web address in marketing materials.

- **Self-reported exposure to Mass Save messaging increased significantly among residential customers.** Eighteen percent of residential customers report exposure to at least one of the channels used by the campaign (i.e., radio, mass transit, online, billboard and email) in the past six months compared to 13% who reported similar levels of exposure in March 2013. In addition, there was a significant increase in exposure to radio advertising among residential customers compared to March 2013 (10% and 6% respectively), which may reflect KSV's effective use of this channel over the campaign period.

- **Campaign messaging was clear and resonated with residential customers.** Almost three quarters of residential customers (71%) agreed that the messages they heard about Mass Save communicated that it could help them lower their energy bills. In addition, 76% of residential customers exposed to messaging reported that they felt the messages conveyed to them were clear. Overall, these findings demonstrate that the Mass Save campaign supports clear and recognizable messages that help promote program awareness.

- **Awareness of other statewide brands remains extremely low.** Consistent with prior statewide marketing studies, the team found very limited awareness of GasNetworks and COOL SMART among both residential and C&I customers. Based on December 2013 survey data, 4% of residential customers are aware of COOL SMART and GasNetworks while 5% of C&I customers are aware of GasNetworks.[1] Findings related to GasNetworks and COOL SMART awareness among Massachusetts contractors is forthcoming.

[1] COOL SMART is targeted to residential customers only.

2. Introduction

This report presents the findings from the December 2013 post-statewide marketing campaign assessment conducted by Opinion Dynamics. The goal of this effort was to assess performance of the statewide marketing campaign across key metrics such as awareness, exposure to and clarity of marketing messages, and attitudes toward both Mass Save and other statewide brands such as COOL SMART and GasNetworks. The results presented within this report are based on quantitative telephone surveys fielded with both residential, and commercial and industrial (C&I) customers. In addition, the evaluation team conducted a thorough review of all 2013 statewide marketing materials, as well as the PA websites.

2013 Campaign Overview

As initially reported in the pre-2013 campaign report from June 2013, the PAs selected a new marketing firm, KSV, to implement the Mass Save Statewide Campaign in 2013. The campaign ran from late March through November 2013, three months longer than in 2012. The campaign targeted residential, low-income, and C&I customers throughout the state in an effort to increase Mass Save awareness. As part of this effort, the sponsors placed an emphasis on explaining who and what Mass Save is, as well as what it means. The central message conveyed how Mass Save can help anyone lower their energy bills.

In terms of marketing tactics, the campaign used a mix of digital, radio, print and out-of-home channels to reach customers across the residential and C&I sectors. KSV and the PAs made special efforts to ensure that the Mass Save logo and a link to the Mass Save website were included on all visual marketing materials. In addition, all of the PAs provide a link to the Mass Save website from their own company sites, and some include a description of Mass Save.

Evaluation Approach

The evaluation team conducted qualitative and quantitative research as part of this study (Table 2). Based on the survey sample sizes, a change in Mass Save awareness of 7 percentage points between the pre- and post-campaign surveys would be a statistically significant change from the previous surveys for both residential and C&I sectors at the 90% confidence and 10% precision level.

Table 2. Evaluation Activities

<table>
<tr><th>Evaluation Task</th><th>Completes</th><th>Description</th></tr>
<tr><td>Marketing Material Review</td><td>N/A</td><td>Provides background on campaign goals and tactics.</td></tr>
<tr><td>Residential Survey</td><td>500</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>C&I Survey</td><td>300</td></tr>
</table>

3. Methodology

After the conclusion of the 2013 Statewide Marketing Campaign, the evaluation team conducted a review of all campaign marketing materials, as well as telephone surveys with a sample of residential and commercial customers in Massachusetts. The surveys were the fourth wave of a series of surveys conducted since February 2012. As outlined in the subsequent sub-sections, the surveys were fielded in the same manner though some of the questions necessarily changed to capture changes in the campaign. Table 3 summarizes all of the primary data collection performed to date, which is referenced where appropriate throughout the report.

Table 3. Summary of Data Collection to Date

Survey Date	Description	Residential Completes	C&I Completes
February 2012	Before the 2012 campaign	401	314
August/September 2012	After the 2012 campaign	402	295
March 2013	Before the 2013 campaign	501	456
December 2013	After the 2013 campaign	500	300

In general, we present data from all four surveys for key metrics of interest, such as Mass Save awareness, and familiarity. We also note throughout the report instances where questions have been recently added and, therefore, where only 2013 data is available.

3.1 Marketing Material Review

The evaluation team completed a review of the statewide marketing materials used in 2013, as well as each of the PA websites. The purpose of this review was to assess the following:

- Inclusion of the Mass Save logo
- Inclusion of a link to the Mass Save website
- Integration of the message strategy, “We have an energy efficiency program for every residential customer and business customer in Massachusetts” and key message take-away “Mass Save means lower bills” on statewide program marketing materials.

3.2 Residential General Population Survey

The evaluation team conducted a telephone survey with a random sample of 500 residential PA customers. Consistent with prior efforts, the survey covered exposure to and awareness of Mass Save, the influence of Mass Save marketing on participation in PA programs, and awareness of other statewide brands. The Team fielded the survey from December 2-22, 2013.

We drew the sample from multiple data files. The team received updated residential customer data from CLC and National Grid in February 2013. The remaining PA customer data came from updated files that the PAs provided to the team in September 2013. These files, which combined PA Customer Information System (CIS) data with program-tracking databases, were merged to develop a master file of all PA residential customers. We used this merged customer database to create a sample frame containing all unique residential accounts with valid contact information. From this frame, we drew a stratified simple random sample with the strata defined as the eighteen unique PA combinations (Table 4). The number of surveys completed for each combination was in proportion to the combination's representation in the overall population.

The total number of interviews, shown in Table 4, provides results at 90% confidence and 4% precision at the statewide level.

Table 4. General Population Survey Sample Approach

Residential Customers[a]	Population		Sample Frame		Sample		Completed Interviews	
	#	%	#	%	#	%	#	%
Columbia Gas -NGRID	70,717	3%	12,817	1%	480	2%	15	3%
Columbia Gas -NSTAR	18,055	1%	19,056	1%	161	1%	4	1%
Columbia Gas -WMECO	28,262	1%	28,613	2%	229	1%	6	1%
Columbia Gas	108,122	4%	166,022	9%	1355	7%	22	4%
Berkshire-NGRID	6,636	0%	2,043	0%	43	0%	1	0%
Berkshire	10,746	0%	15,339	1%	124	1%	3	1%
Berkshire-WMECO	14,998	1%	15,155	1%	132	1%	3	1%
WMECO	120,887	5%	121,820	7%	1007	5%	25	5%
CLC-NGRID	56,214	2%	10,956	1%	453	2%	12	2%
CLC	88,774	4%	134,032	7%	1156	6%	17	3%
NGRID-New England Gas	18,952	1%	6,009	0%	115	1%	2	0%
NSTAR-New England Gas	1,400	0%	1,524	0%	20	0%	1	0%
NGRID-Unitil	1,619	0%	563	0%	9	0%	0	0%
Unitil	21,209	1%	22,265	1%	185	1%	5	1%
NGRID-NSTAR	241,665	10%	81,999	5%	1523	7%	49	10%
NGRID	1,143,894	46%	438,428	24%	7354	36%	223	45%
NSTAR	538,828	22%	698,494	39%	5788	28%	109	22%
New England Gas	10,512	0%	23,455	1%	218	1%	3	1%
Total	**2,501,490**	**100%**	**1,798,590**	**100%**	**20352**	**100%**	**500**	**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.

Table 5 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).

Table 5. Disposition of Targeted Residential Customers

Disposition	N
Completed Interviews (I)	500
Partial (P)	47
Eligible Non-Interviews	7,532
Refusals (R)	3,274
Telephone Answering Device (NC)	1,964
Mid-Interview Terminate (R)	242

Disposition	N
Respondent Never Available (NC)	1,799
Language Problem (NC)	253
Not Eligible (e)	2,586
Fax/Data Line	82
Non-Working	1,935
Wrong Number	274
Business/Government	272
No Eligible Respondent	10
Duplicate Number	11
Unknown Eligibility Non-Interview (U)	9,687
Not Dialed/Worked	4,980
No Answer	4,522
Busy	103
Call Blocking	82
Total Customers in Sample	20,352

Table 6 provides the response and cooperation rates, which are lower than the pre-campaign survey. The response rate is similar to the response rate for the 2012 Umbrella Marketing survey, which was 4%.

Table 6. Residential Survey Response and Cooperation Rates

AAPOR Rate	Percentage
Response Rate (RR3)	3%
Cooperation Rate	12%

Weighting

Consistent with past surveys, we developed and applied weights to the telephone survey data to match the composition of customers within the Massachusetts population based on homeownership. Table 7 shows the weights for the telephone survey data.

Table 7. General Population Survey Weighting

Residency	Massachusetts Population	Unweighted Gen Pop Data	Home Weight
	%	%	
Own	62%	65%	0.96
Rent	38%	35%	1.08

3.3 Commercial & Industrial (C&I) Customer Survey

Opinion Dynamics conducted a telephone survey among PA business customers to assess awareness, familiarity, and associations with Mass Save. The Team surveyed a random sample of 300 PA C&I customers between December 2-27, 2013.

We drew the sample of C&I customers from two data sources: files that the PAs provided to the team in September 2013[2] and data provided by the PAs to the Non-Residential Large C&I Evaluation Team in 2012. Table 8 shows the overall sample design and completed interviews, which provide results at 90% confidence and 5% precision at the statewide level.

Table 8. C&I Sample Design

C&I Customers	Population[a]	Sample Frame	Sample	Completed Interviews
Total	200,872	199,587	20,000	300

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

Table 9 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).

Table 9. Disposition of Targeted C&I Customers

Disposition	N
Completed Interviews (I)	300
Partial (P)	35
Eligible Non-Interviews	11,637
Refusals (R)	2,799
Mid-Interview Terminate (R)	89
Telephone Answering Device (NC)	5,386
Respondent Never Available (NC)	3,266
Language Problem (NC)	97
Not Eligible (e)	3,964
Fax/Data Line	212
Non-Working	2,592
Wrong Number	273
Government/Other Organization	727
No Eligible Respondent	154

[2] The team received 2013 data for three utilities: Berkshire Gas, Unitil, and WMECO. The remaining PA's provided data in 2012.

Disposition	N
Duplicate Number	6
Unknown Eligibility Non-Interview (U)	4,064
No Answer	3,683
Busy	318
Call Blocking	63
Total Participants in Sample	20,000

The following table provides the response and cooperation rates, which declined somewhat from the March 2013 pre-campaign survey.

Table 10. C&I Survey Response and Cooperation Rates

AAPOR Rate	Percentage
Response Rate (RR3)	2%
Cooperation Rate	9%

Weighting

Given the lack of readily available population-level data on Massachusetts businesses, the Evaluation Team did not weight the results of the commercial survey. However, the Team also considered weighting the 2013 survey to match the characteristics of the first survey conducted in 2012. However, we determined that weighing the data was unnecessary because we spoke with similar firms for each of the survey waves (Table 32). In addition, there is no consistent or significant relationship between any of the firmographics and Mass Save awareness across the waves.

4. Study Findings

The following section of the report presents results from the review of statewide marketing materials, as well as the residential and C&I surveys conducted in December 2013. Our analysis of the surveys focuses on significant differences over time, as well as specifically between the March 2013 and December 2013 surveys.

4.1 Campaign Overview

As Table 11 below illustrates, the 2013 campaign used a combination of print, out-of-home, digital and radio media channels to reach residential and commercial customers in Massachusetts. Our review covered 32 marketing pieces targeted at residential customers, 25 pieces targeted at commercial customers and two gas station window clings with general messages, which were not specific to one customer segment in particular. The team evaluated unique gas pump topper and billboard artwork as one media channel with the understanding that customers would view these pieces in tandem at a single touch point.

Table 11. Summary of 2013 Statewide Marketing Materials

Media Channel	Residential	Commercial and Industrial	General
Digital: Digital Banners	√	√	
Digital: Facebook Ad	√		
Out-of Home: Billboard	√	√	
Out-of Home: Bus	√		
Out-of Home: Commuter Rail	√	√	
Out-of Home: Gas Station	√	√	√
Radio	√	√	
Print		√	

The following sub-sections highlight our findings based on a review of all materials.

Logo and Link. The Mass Save logo is included in all visual marketing materials. A link to the Masssave.com website is also included in all residential and general materials and all but one of the commercial materials. In addition, the campaign regularly lists PA sponsors by name or refers to the collaboration across Massachusetts utilities and energy efficiency service providers. Within radio advertisements, the campaign references the collaboration across the PAs rather than listing each utility by name. The only marketing piece that did not include sponsor specific references was a Facebook ad targeted at residential customers.

Table 12. Use of the Mass Save logo, link to MassSave.com and Reference to PAs

	Residential		Commercial and Industrial		General	
	%	Total # of ads	%	Total # of ads	%	Total # of ads
Logo [a]	100%	26	100%	21	100%	2
Reference to MassSave.com	100%	32	96%	25	100%	2
List of PAs by name	96%	32	84%	25	100%	2
Explanation of PA Collaboration (If PAs not listed)	86%	7	100%	4	-	-

[a] Excludes radio.

Message: Mass Save means lower energy bills. All of the residential and commercial materials we reviewed convey the message that Mass Save means lower energy bills. All but one tell a consistent narrative that Mass Save helps residents or businesses lower their energy bills, save money, and free-up funds for other quality of life enhancing products and services through the stories of Massachusetts energy users. The following are examples of the language used to express this message:

Residential:

> *"MassSave.com helped Erica lower her family's energy bills. This calls for ice cream."*

> *"Across Massachusetts, all kinds of people use Mass Save to save real money on their energy bills. What do they do with that money? That's up to them."*

Commercial:

> *"MassSave.com helped Jim cut business costs with smart energy solutions. Now Fridays have become Bagel Fridays."*

> *"Mass Save has helped businesses of all sizes; all across Massachusetts lower their energy costs. And that means lower business costs. What they do with the money they save? That's their call."*

Message: Mass Save has solutions for everyone. All materials use language that explains Mass Save has solutions for everyone. Most materials are direct with this message. For example:

> *"No matter who you are. You'll find ways to lower your energy bills at MassSave.com"*

> *"Mass Save has energy solutions that can help just about anyone save money. So visit MassSave.com today."*

Billboard ads tend to be slightly more general in delivering the message:

> *"MassSave.com helps Massachusetts families lower their energy bills."*

> *"MassSave.com helped Steven lower his energy bills"*

Overall, it seems as though the sponsors of Mass Save and their implementer have done an excellent job ensuring logos and links are present in the marketing materials, and that they communicate key messages.

4.1.1 PA Websites

The team also evaluated the websites of each of the eight PA's that were Mass Save contributing sponsors in 2013. Starting at the landing page of each PA website and clicking through the subsequent pages dedicated to Energy Efficiency, the research team completed a visual search for the Mass Save logo, links to MassSave.com and any other Mass Save program descriptions.

- Link. All eight websites include at least one link to MassSave.com and six of the eight sites include multiple links to MassSave.com. However, the strategy for linking to MassSave.com varies widely from website to website. Links were easy to find on most websites and are usually located under the Energy Efficiency section of the site. Other sites link to MassSave.com from less prominent locations, such as FAQs or Tips pages that may be hard for a visitor to find if they are not actively looking for the link.

- Logo. In contrast to the link, the PA websites use the Mass Save logo less frequently. It is only included on three of the PA websites.

Table 13. Use of Mass Save logo and link to MassSave.com

Element	Number of Sites that Include Element (n=8)
Link to Masssave.com	8
Link to Masssave.com from more than 1 landing page	6
Mass Save logo	3

- Messaging. Only three PA websites provide descriptions that give context to the Mass Save initiative. Two do this by including the language that is used on MassSave.com's "About" page which presents a brief description of the Mass Save initiative and names the eight sponsors:

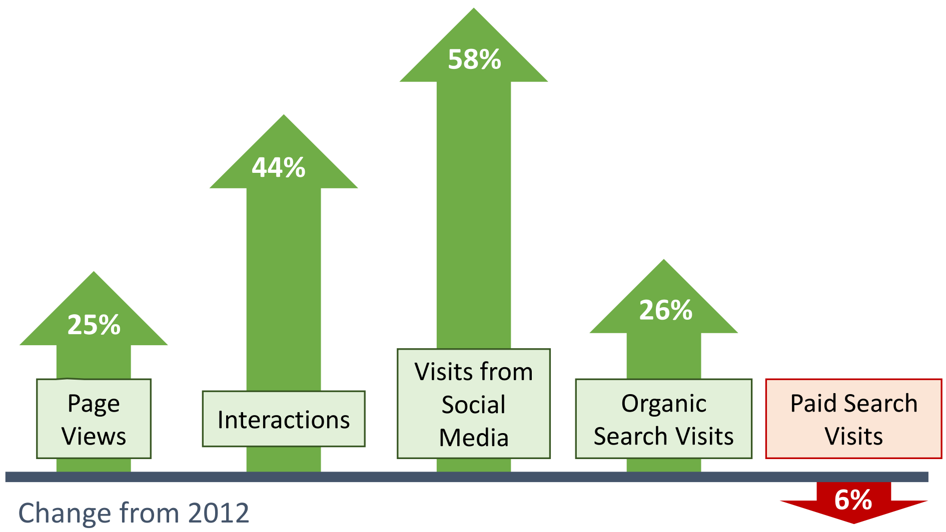
  Mass Save® is an initiative sponsored by Massachusetts' gas and electric utilities and energy efficiency service providers, including Columbia Gas of Massachusetts, The Berkshire Gas Company, Cape Light Compact, National Grid, New England Gas Company, NSTAR, Unitil, and Western Massachusetts Electric Company. The Sponsors of Mass Save work closely with the Massachusetts Department of Energy Resources to provide a wide range of services, incentives, trainings, and information promoting energy efficiency that help residents and businesses manage energy use and related costs.

4.1.2 MassSave.com Web Performance

Overall, the Mass Save website performed well in 2013 and continues to serve as a critical component of statewide marketing efforts. Based on data provided by the PAs, it is clear that visits to MassSave.com, as well as the number of unique visitors have increased significantly over 2012. In particular, the number of website visits increased by 25% from 668,353 to 873,685 and the number of unique visitors increased by 24% from 455,561 to 566,558 over the past year.

Figure 1 presents other key milestones for MassSave.com in 2013.

Figure 1. Web Analytics Snapshot



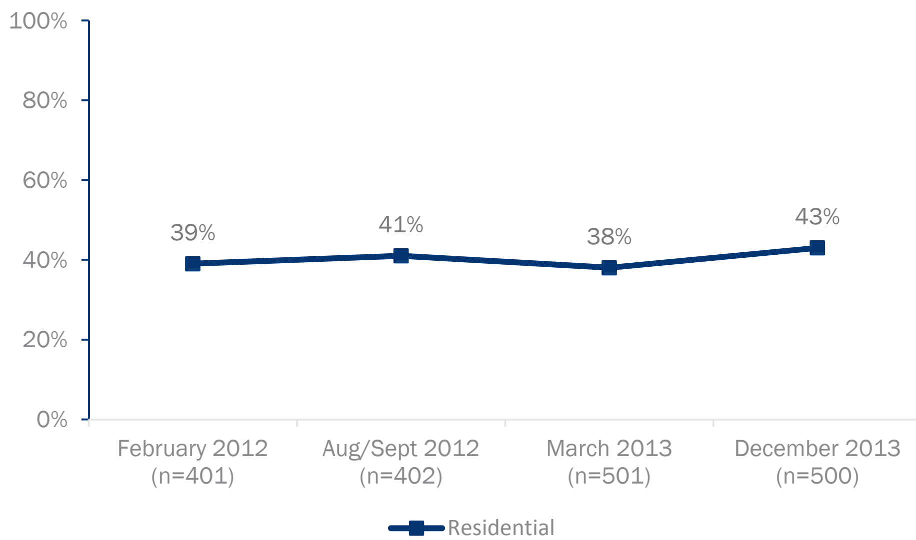
Source: MassSave.com Web Performance Report, December and Year 2013.

4.2 Mass Save Awareness and Associations

4.2.1 Brand Awareness and Familiarity

The residential and C&I surveys asked respondents whether they had seen or heard of Mass Save.[3] As shown in Figure 2, overall, 43% of residential respondents reported that they had heard of the campaign in December 2013. This level of awareness is generally consistent with the prior time-periods.

Figure 2. Residential Awareness of Mass Save (Aided Name Only)



In terms of the most recent survey conducted, among residential customers, those who own their residence are significantly more likely to be aware of Mass Save (53%) than those who rent (28%). This is not surprising given the level of exposure homeowners have to messaging from their utilities, as well as the larger number of energy efficiency opportunities available to them. Further, the team also found higher levels of Mass Save awareness among those who had made significant changes to their homes in the past year (55%).

When looking at the degree of familiarity with Mass Save among residential customers, we also see results that are consistent with each of the prior time-periods. In general, we see that about one-fifth of all residential customers are at least somewhat familiar with Mass Save.

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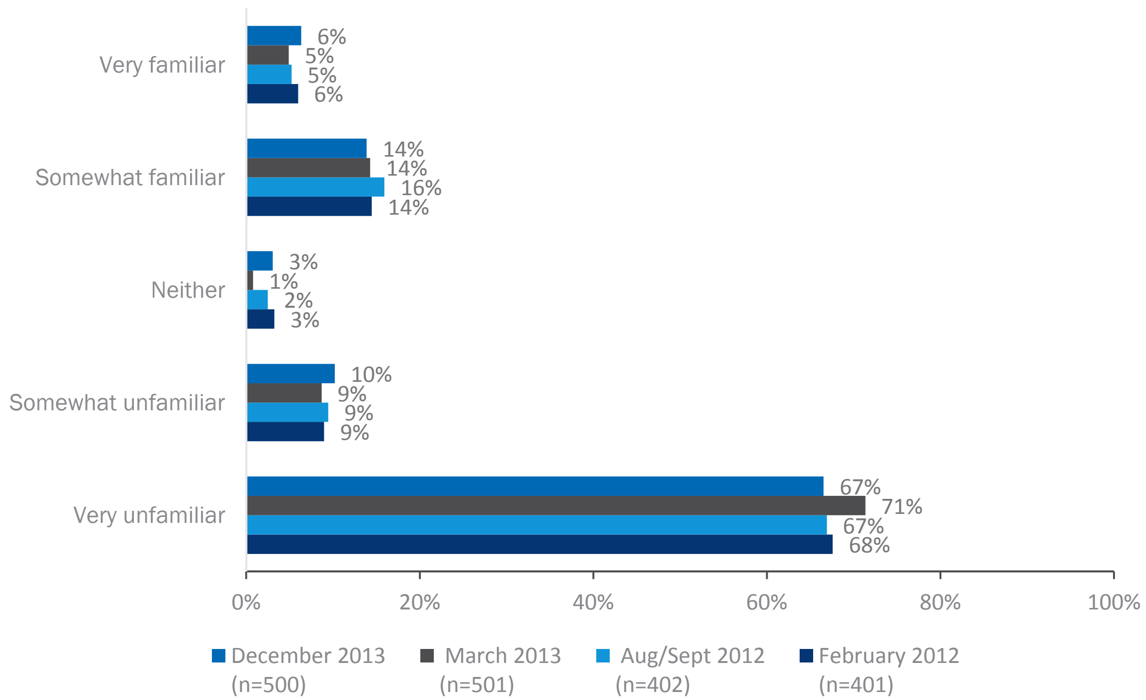
[3] The team considered those respondents who cited Mass Save unaided in questions E1, E2 or E3 aware of Mass Save in question MR1.

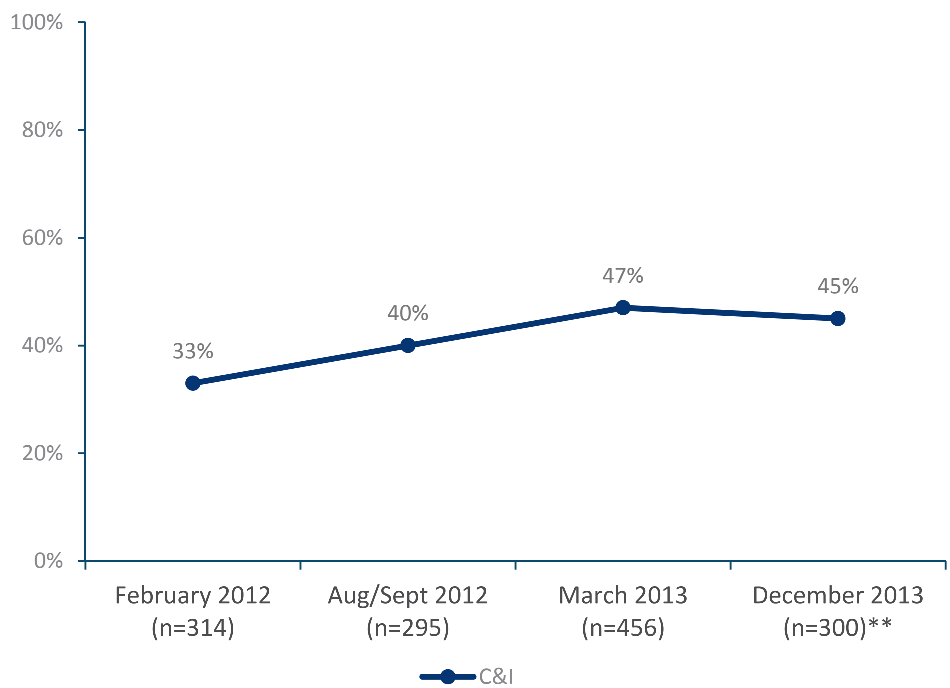
Figure 3. Residential Customer Familiarity with Mass Save



Note: The team considers respondents who are not aware of Mass Save to be "very unfamiliar."

The team saw similar trends in awareness and familiarity within the C&I sector. In particular, as shown in the figure below, the December 2013 survey shows that almost half of C&I customers are aware of Mass Save (45%). This represents a significant increase in awareness from the February 2012 survey (33%), although it is in line with the March 2013 findings. In general, changes in Mass Save awareness among C&I customers over time reflects changes in the marketing strategy and tactics used for this group. For example, marketing to the C&I sector ramped up significantly after the first year of the statewide campaign.

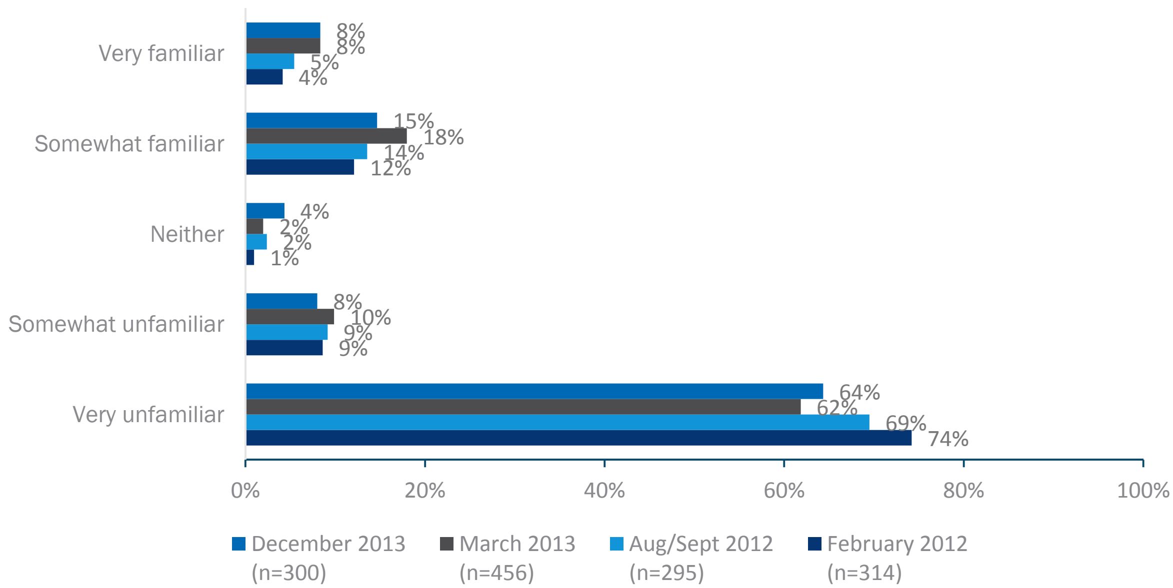
Figure 4. C&I Awareness of Mass Save (Aided Name Only)



** Significantly different from February 2012 at the 95% level.

In terms of Mass Save familiarity among C&I customers, there have also been changes over time with the most significant increase taking place between 2012 and 2013 (5% very aware in August/September 2012 and 8% in March and December 2013). However, there is also some indication of uncertainty among C&I customers as to the target audience for Mass Save. For example, survey findings indicate that while many businesses that are aware of Mass Save believe that it offers solutions for both their business and home (44%), one-fifth believe it is for their home only (22%) and one-third (30%) did not know if the program focuses on home or business.

Figure 5. C&I Customer Familiarity with Mass Save



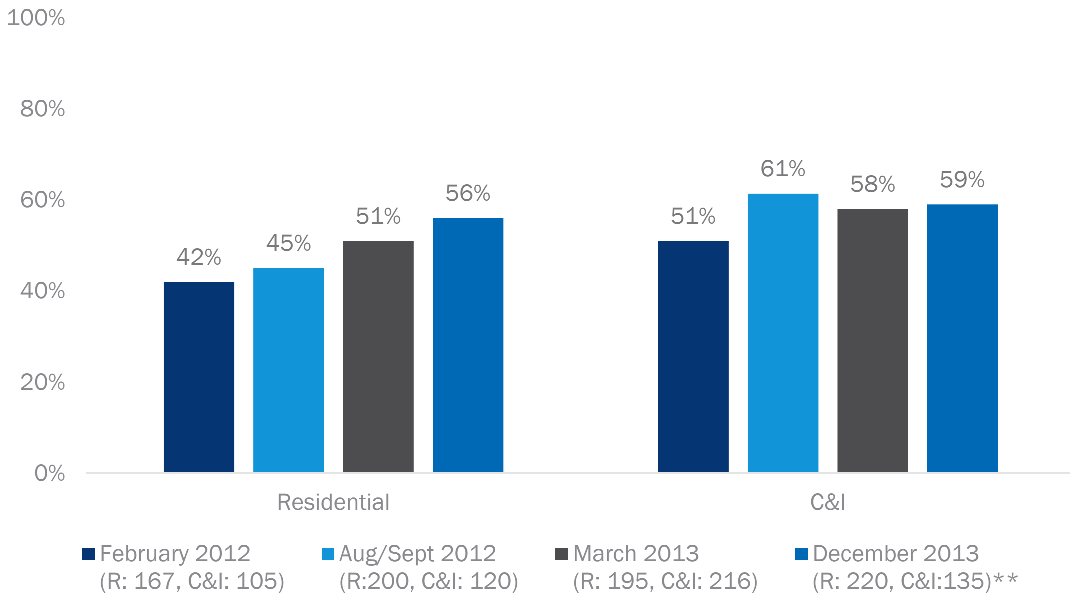
Note: The team considers respondents who are not aware of Mass Save to be “very unfamiliar.”

4.2.2 Website Awareness

As in prior years, the Mass Save website has continued to play an important role in statewide marketing efforts by providing PA customers with a centralized source of information about energy efficiency programs in Massachusetts. When asked whether they knew about MassSave.com, just over half of the residential respondents aware of Mass Save said they knew of the Mass Save website (56%). This represents a significant increase in awareness levels from the 2012 post-campaign survey as shown in Figure 6.

Further, almost sixty percent of C&I respondents aware of Mass Save also said they knew about the existence of the Mass Save website (59%), which represents a significant increase in awareness levels from February 2012 (51%). The increases seen among residential and C&I customers may be related to the campaign’s increasingly consistent inclusion of the web address in marketing materials.

Figure 6. Awareness of MassSave.com among Customers Aware of Mass Save



Despite increases in awareness over time however, there has been no significant change in usage of the site. As shown in Table 14 below, approximately one-quarter of those aware of the Mass Save website visited it at least once in the past six months (Residential: Pre-34%, Post-28%, C&I, Pre-29%, Post-24%).

Table 14. Mass Save Website Usage in Past 6 Months

Website Visits	Residential				C&I			
	Feb 2012 (n=70)	Aug/Sept 2012 (n=72)	March 2013 (n=92)	December 2013 (n=117)	Feb 2012 (n=54)	Aug/Sept 2012 (n=49)	March 2013 (n=122)	December 2013 (n=106)
None	63%	68%	65%	72%	63%	61%	70%	76%
Once	15%	19%	15%	12%	13%	20%	18%	10%*
2-5 times	19%	10%	19%	14%	24%	10%*	9%	9%
6-10 times	-	2%	-	2%	-	4%	1%	2%
11 or more	2%	1%	-	-	-	-	2%	1%
Don't know	-	-	1%	-	-	4%	-	1%

* Significant at the 90% level.

4.2.3 Mass Save Associations

The study also explored brand associations. The team gathered this information through telephone surveys by asking respondents what they associate with Mass Save in both an unaided and aided fashion.

Residential Associations

As shown in Table 15, responses to the open-ended question about associations with Mass Save varied widely among residential customers. However, the top association is with energy assessments or audits, followed by specific rebates or incentives. In addition, brand associations varied to some degree by housing status. While homeowners were significantly more likely to associate Mass Save with energy assessments or audits (Owners 31%, Renters 18%), renters were more likely to associate Mass Save more generally with rebates, saving money and discounts (Renters 15%, Owners 9%).

Table 15. Unaided Residential Associations with Mass Save among Those Aware (Multiple Response)

Associations	Residential	
	March 2013 (n=194)	December 2013 (n=218)
Energy assessment or audit	27%	30%
Rebates/Incentives – Specific Measure	16%	15%
Resource for energy information	12%	9%
Saving energy/reducing energy bills	20%	8%*
Rebates/saving money general	6%	8%
Utility/PA companies	7%	5%
Energy saving program/home improvements	4%	2%
Affiliated Products (i.e., CFLs, appliances)	2%	2%
State government	1%	3%
Related concepts (i.e., recycling, energy)	5%	2%
Other	13%	7%
Don't know	17%	20%

*Significant at a 90% level

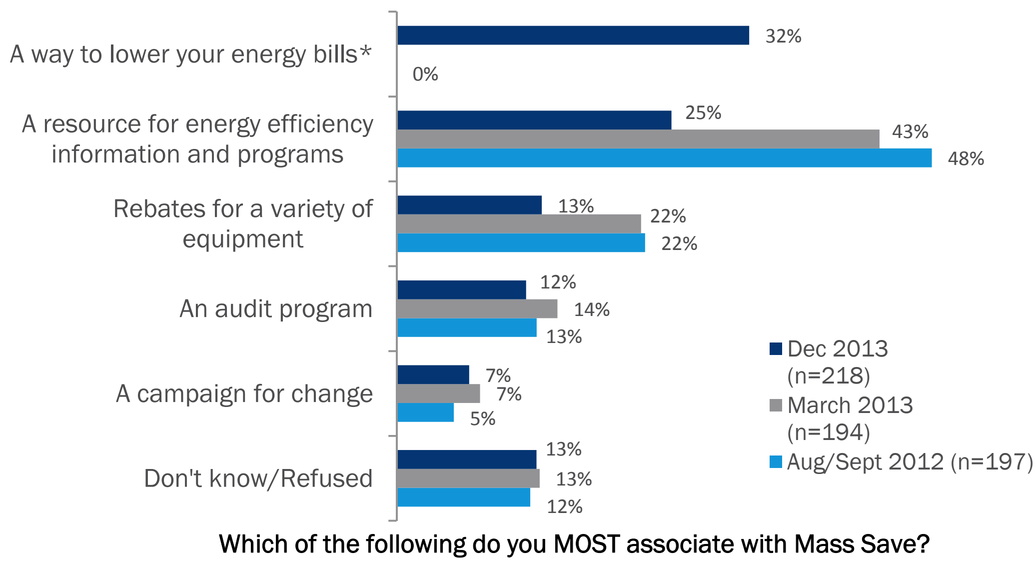
In addition, the campaign continues to excel in conveying that Mass Save relates to energy. When asked directly, almost 90% of residential customers associate Mass Save with energy (84% pre and 85% post). Customer understanding of this aspect of the statewide brand has been consistent and strong.

When asked what Mass Save *most* conveys, the evaluation team presented a set of options that reflect the prior use of the Mass Save name (home energy audits), as well as some of the associations the brand would like to have. For example, in the past, a goal of the campaign was to serve as a resource for information while in 2013 the messaging shifted specifically to serving as a resource for lowering one's energy bills. Because the latter was a new campaign theme, we did not ask about this association in previous surveys and only present results from the December 2013 survey.

As shown in Figure 7, the most frequent aided association with Mass Save among residential customers is "a way to lower your energy bills" (32%), which indicates that 2013 messaging has been effective and clear. In addition, residential customers continue to associate Mass Save with a "resource for energy efficiency information and programs" (March 2013 - 43%, Dec 2013 - 25%) and "rebates for a variety of equipment"

(March 2013 – 22%, Dec 2013 - 13%), although we see significant decreases in both areas over the 2013 campaign period. These declines and the associated rating for "a way to lower your energy bills" suggest that the new campaign messaging has resonated with customers while they also have some knowledge of what Mass Save is providing and promoting to residential customers.

Figure 7. Aided Associations among Residential Customers



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

*First asked in 2013 Post survey

Commercial Associations

Similar to the residential sector, C&I customers associate a number of concepts with Mass Save. The most commonly mentioned is energy audits (December 2013 - 38%) followed by the notion of saving energy in general (December 2013 - 16%), and PA programs (December 2013 - 9%). The most significant change since March 2013 is in the percentage of customers mentioning energy audits.

Table 16. Unaided C&I Associations with Mass Save among Those Aware (Multiple Response)

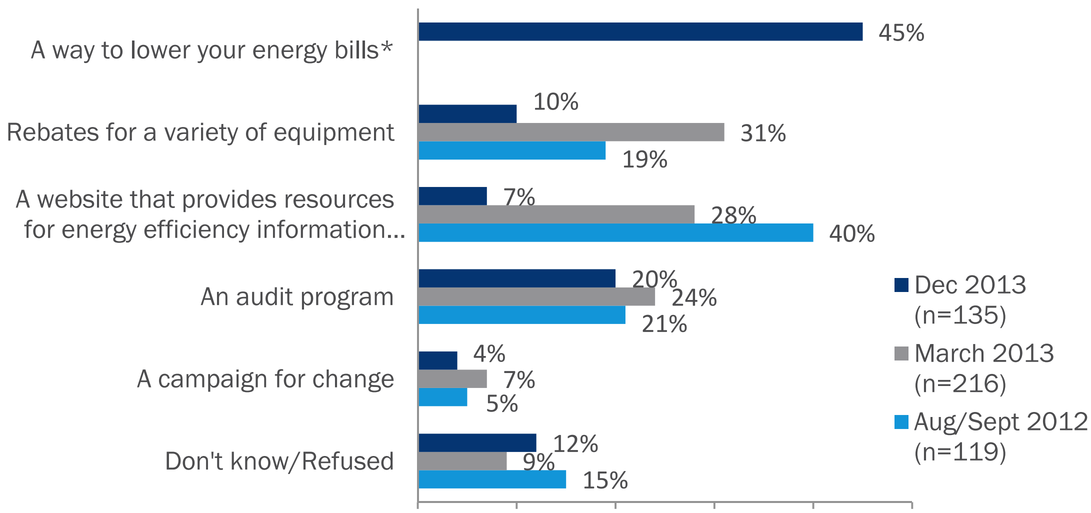
Associations	C&I	
	March 2013 (n=216)	December 2013 (n=135)
Energy assessment or audit	22%	38%**
Saving energy/conservation/environmental	19%	16%
Utility/PA companies	13%	9%
Rebates/incentives for lighting/controls	10%	5%
Energy-related products/concept (i.e., HVAC, electricity)	7%	4%
Saving money/discounts	6%	5%
Resource for energy information	6%	4%
Rebates/incentives for HVAC equipment	6%	3%
Energy saving programs	5%	2%
Other	16%	11%
Don't know	13%	17%

**Significant at a 95% level

Consistent with the residential sector, among those aware of Mass Save, there is little doubt that it relates to energy when asked about the association directly (98% pre and 94% post).[4] Further, it is clear that 2013-campaign messaging resonated with the C&I population given the percentage that most associate Mass Save with "a way to lower your energy bills" (45%).

[4] Question MR6: Do you associate Mass Save with energy?

Figure 8. Aided Associations among C&I Customers



Which of the following do you MOST associate with Mass Save?

4.2.4 Perceived Sponsorship of Mass Save

Across all of the past surveys, we have asked respondents who they think sponsors Mass Save as a way to gauge their knowledge of the campaign. Based on the December 2013 surveys, approximately half of residential and C&I customers think the PAs are involved in Mass Save with limited recognition of the state's role. Further, as shown in Table 17, the 2013 campaign did not affect residential customers' knowledge of Mass Save sponsorship. However, there has been a significant decrease in the percentage of C&I customers who believe the PA's are campaign sponsors (March 2013 - 55%, December 2013 - 45%) as well as an increase in the percentage of C&I customers who do not know who sponsors the campaign (March 2013 - 30%, December 2013 - 41%).

Table 17. Perceived Sponsorship of Mass Save among Those Aware (Multiple Response)

Perceived Sponsors	Residential				Commercial			
	Feb 2012 (n=180)	Aug/Sept 2012 (n=174)	March 2013 (n=194)	Dec 2013 (n=218)	Feb 2012 (n=105)	Aug/Sept 2012 (n=119)	March 2013 (n=216)	Dec 2013 (n=135)
Utility or PA company/companies	51%	44%	46%	46%	53%	54%	55%	45%**
State government	9%	6%	8%	13%	10%	7%	10%	7%
Environmental nonprofits or NGOs	4%	2%	2%	--	4%	5%	2%	2%
Retailers/manufacturers (i.e., GE, local businesses)	3%	2%	2%	5%	--	3%	2%	4%
Federal government (i.e., Department of Energy)	2%	2%	--	2%	--	3%	1%	3%
Government/politicians/political parties	5%	4%	--	--	--	--	--	--

Perceived Sponsors	Residential				Commercial			
	Feb 2012 (n=180)	Aug/Sept 2012 (n=174)	March 2013 (n=194)	Dec 2013 (n=218)	Feb 2012 (n=105)	Aug/Sept 2012 (n=119)	March 2013 (n=216)	Dec 2013 (n=135)
(Other)	8%	6%	5%	2%	7%	2%	2%	1%
(Don't know)	28%	37%*	37%	34%	28%	33%	30%	41%*

**Significant at a 95% level

*Significant at a 90% level

It is also important to note that perceived sponsorship varies within the residential sector. In particular, those who own their residence are significantly more likely to see the PAs as Mass Save sponsors than renters are (50% vs. 33%). This may be due to the greater number of energy efficiency programs that target measures of greater interest to homeowners, as well as their assured role in paying utility bills and vested interest in improving their property.

4.3 Exposure to Mass Save Marketing

A key metric for the Mass Save statewide marketing campaign is the clarity with which messages are conveyed to the target population. As documented earlier in the report, the campaign team implemented a range of marketing tactics with some differences between those used to target the residential versus C&I populations. As a result, we asked slightly different survey questions for each sector based on the specific tactics used to reach them. Given these differences, we also present findings for residential and C&I customer separately.

4.3.1 Residential Exposure

The team asked residential respondents who were aware of Mass Save whether they had ever heard about it through a number of the channels specifically used in the 2013 campaign. For each channel through which respondents had heard of Mass Save, they we asked when it was – during the past six months or whether it was longer ago than that.[5] Note that the team added a number of new channels in the December 2013 survey, which the campaign implementer plans to continue using in 2014. Table 18 presents the results out of the full residential customer population, which shows a significant increase in the proportion of customers reporting exposure across any channel in the past six months (March 2013 – 13%, December 2013 – 18%).

[5] The order in which the channels were read on the survey varied across the respondents.

Table 18. Residential Customer Exposure to Mass Save Marketing Tactics in the Past Six Months

Campaign Channel	All Residential Respondents	
	March 2013 (n=501)	Dec 2013 (n=500)
Any Channel – Ever	21%	25%
Any Channel – Past 6 Months	13%	18%**
Radio Ad	6%	10%*
Mass Transit	4%	5%
Online Ad	4%	5%
Billboard	4%	4%
Email	2%	3%
Post Campaign Survey Only		
Information when shopping for appliances	N/A	6%
Information at grocery stores, restaurants, or other stores	N/A	6%
Gas Pump	N/A	2%

Note: Estimates of exposure through any channel are based only on the categories included in the March and December 2013 surveys. The results from December 2013 only, are not included in these figures.

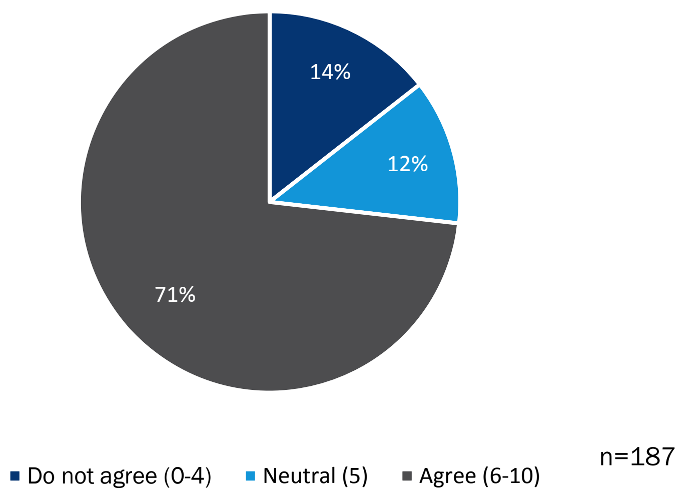
** Indicates significance at the 95% level.

Looking specifically at those aware of Mass Save (not included in the table above), respondents to the December 2013 survey report exposure to radio ads (35%) and information while shopping for appliances the most frequently (29%). Further, the survey results show that significantly more residential customers recall radio ads than before the campaign (March 2013 - 28%, December 2013 - 35%), which illustrates the campaign team's efforts in that area over 2013.

It is also clear that the 2013 campaign team did an excellent job of presenting messaging to customers as illustrated by the overwhelming majority of residential customers who agree[6] that the messages they heard communicated that Mass Save can help you lower your energy bills (71%).

[6] Agreement is indicated by a rating of 6 to 10 on a 10-point scale where 0 is "not at all agree" and 10 is "completely agree".

Figure 9. Residential Perceptions that Mass Save can Help Lower Energy Bills



Note: 10-point scale where 0 is “not at all agree” and 10 is “completely agree”.

These customers also indicated that the messages conveyed to them were clear (76%). Those who did not find the messages clear mainly thought that there was not enough information (26%), the link to energy was unclear (9%), they did not know how to act on the messaging (9%) or that they did not understand how Mass Save was different from other programs (6%). Over a quarter of respondents provided varied responses that was classified as “other” and 19% said they did not know what was unclear about the messages.

4.3.2 C&I Exposure

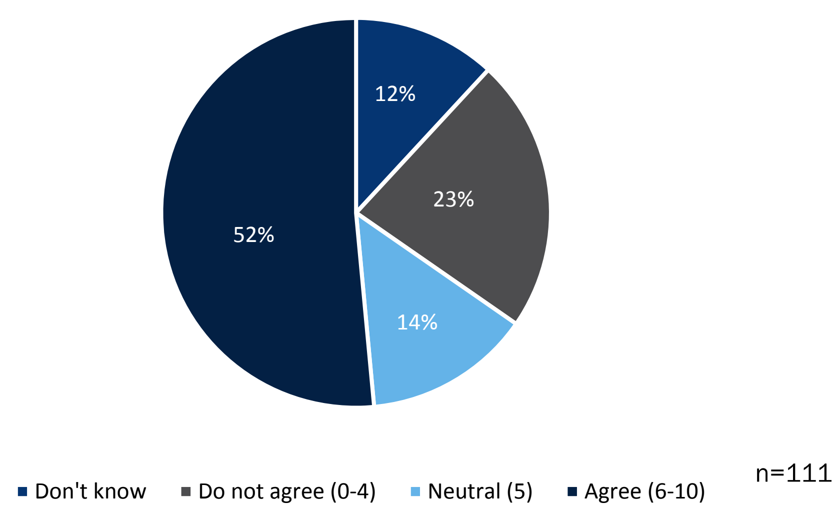
As shown in Table 19, we did not see an increase in the percentage of customers reporting exposure to the Mass Save brand through a variety of channels. In particular, recall of radio, online, print, and public transportation advertising remained the same as prior to the campaign. The team will monitor recall of messaging from billboards, gas pumps and email over the course of the 2014 campaign as these tactics are new for C&I.

Table 19. C&I Customer Exposure to Mass Save Marketing Tactics in the Past Six Months

Campaign Channel	All C&I Respondents	
	March 2013 (n=456)	December 2013 (n=300)
Any Channel – Ever	30%	27%
Any Channel – Past 6 Months	20%	18%
Radio Ad	13%	12%
Online Ad	5%	4%
Newspaper/Journal	7%	4%
Mass Transit	4%	4%
Post Campaign Survey Only		
Billboard	N/A	6%
Email	N/A	3%
Gas Pump	N/A	1%

Messaging regarding the role that Mass Save can play in helping customers to lower their energy bills does not appear to have resonated as strongly with C&I customers exposed to messaging as residential customers. Figure 10 illustrates that half of C&I customers (52%) agree that the Mass Save messages they heard communicated that Mass Save can help your business lower its energy bills.

Figure 10. C&I Perceptions that Mass Save can Help Lower Energy Bills



Note: 10-point scale where 0 is “not at all agree” and 10 is “completely agree”.

However, when asked more generally whether they thought the messages they heard were clear, 69% of the C&I customers exposed to Mass Save messaging said that they thought they were. This inconsistency in response may indicate that C&I customers feel they are receiving other types of information about Mass Save. The team may modify the next survey to explore this in detail by asking C&I customers what information they think they received.

4.3.3 Attitudes towards Mass Save

Based on the general description that was provided, 75% of residential respondents and 69% of C&I customers hold a favorable opinion of Mass Save. This is similar to results from the August/September 2012 survey effort when this question was last asked (Residential: 80%, C&I: 75%). The team also found that within the residential sector, while homeowners and renters both hold favorable opinions of Mass Save, homeowners are more likely than renters to express a "Very favorable" opinion (Owners - 39%, Renters - 29%). We found no differences in opinion among those who has made significant changes to their homes within the past year and those who had not.

4.4 PA Program Awareness and Participation

Another key metric for statewide marketing efforts is to ensure customer awareness of PA programs. As a result, within the surveys we asked respondents a number of questions to assess knowledge of the PA programs currently offered. The majority of results presented in this section focus on 2013 as this metric gained importance over the past year. As a result, the team developed a number of new survey questions to best assess progress in this area.

Residential

Overall, almost three-quarters of residential respondents (March 2013 - 73%, Dec 2013 - 74%) know there are programs to help save energy in their homes.[7] Additionally, homeowners remain significantly more likely than renters to know about PA programs (December 2013 - 79% and 66%, respectively). In general, given that awareness of PA programs was high before the 2013 campaign, it is not surprising that we do not see a large increase in awareness after the 2013 campaign.

When we look more closely at residential customer knowledge of PA programs, we see that respondents are moderately familiar with the types of assistance offered. When asked about the type of help or assistance these programs provide, respondents most commonly recall a particular rebate or PA program (March 2013 - 54%, Dec 2013 - 32%), home energy audits (March and Dec 2013 - 22%), and general rebates, incentives and other financial assistance to support cost savings (March 2013 - 13%, December 2013 - 18%).

[7] Results are based on question A0a, which was added in 2013.

Table 20. Types of Assistance Provided by PA Programs among Those Aware

Type of Assistance Provided	Residential	
	March 2013 (n=364)	December 2013 (n=369)
Rebates/Programs - Specific Program	54%	32%
Home Energy Audit	22%	22%
Rebates/Incentives/Loans/Cost savings (general)	13%	18%
Saving energy or efficiency tips/education (general)	16%	17%
Tax incentives	3%	4%
Fuel Assistance/Heating Loans	3%	2%
Low Income/Budgeting/Discounted rate programs	8%	2%
Utility/energy provider	4%	1%
(Other)	4%	4%
(Don't know)	23%	24%

Note: The team asked this question for the first time in 2013.

In terms of program sponsorship, two in five customers who are aware of programs to help them save energy in their homes do not know what groups or organizations offer these programs. Among those who commented on the groups or organizations that sponsor the programs, customers most frequently say utilities and energy service providers offer the programs (14%).

Among residential customers aware of the energy efficiency programs offered by the PAs, approximately half (50%) believe the programs that they know of could help their household. This finding is consistent with findings from the March 2013 survey (51%). The reasons December 2013 respondents provide for why the programs they know of would not help their household vary. While 16% say they are satisfied with their current efficiency levels, 20% say they are unable to make changes due to either their status as a renter or circumstances regarding the structure or age of the home, and 10% want or need specific measures that they do not believe to be covered by the programs they are aware of.

Program Participation

The December 2013 survey also explored the prevalence of specific home improvements and homeowners' participation in PA programs. Overall, in the past year, 26% of residential customers report having made major structural changes to their home. Further, the percentage of customers who made structural changes to their homes varies based on awareness of Mass Save. For example, significantly more customers who are aware of Mass Save (31%) made changes to their homes than those who are not aware (22%).

Table 21. Structural Changes Made by Residential Survey Respondents

Structural Change Made	% of Residential Customers December 2013 (n=500)
Replaced furnace, boiler or central air conditioner	11%
Added square footage to home	2%
Other major structural changes including insulation, air or duct sealing, or replacing windows	20%

Note: The team asked this question for the first time in December 2013.

In general, the majority of residential customers who are both aware of Mass Save and made changes to their homes (85%) did not participate in an energy saving program sponsored by their utility or energy efficiency service provider. Among those not participating, 18% said they were not aware of opportunities through their utility and 15% report not needing the sponsored program to make the upgrades. These results indicate that despite self-reported awareness, customer knowledge of Mass Save and PA programs may be limited.

For those residential customers who are both aware of Mass Save and made changes to their homes, 15% report participating in an energy efficiency program sponsored by their utility or energy efficiency service provider.[8] As shown in Table 22, nearly a third of these customers completed a home energy assessment on their home (27%), while another 17% say the participated in an appliance incentive program and 11% say they participated in a program through Mass Save.

Table 22. Program Participation among Residential Customers (Multiple Response)

Program	Residential	
	March 2013 (n=52)	December 2013 (n=60)
Home Energy Assessment/Audit	32%	27%
Appliance Incentives	17%	17%
Mass Save	4%	11%
Insulation Incentives	8%	8%
Heating Incentives	8%	7%
Low income/reduced rates/heat assistance	8%	5%
Alternative/renewable energy programs/incentives	4%	5%
Lighting incentives	2%	5%
Program through utility unspecified	13%	5%
Other	4%	10%

[8] This is consistent with findings from the March 2013 survey (10%).

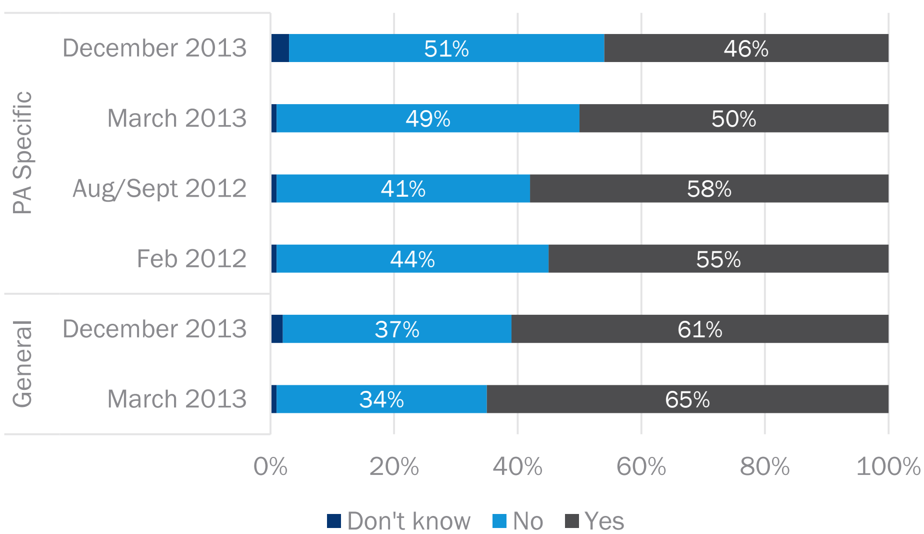
Don't know	12%	7%

Note: Responses with less than 5% were not included.

C&I

Among C&I customers, awareness of energy saving programs is also high. As shown in Figure 11, more than half of C&I respondents (March 2013 - 65%, December 2013 - 61%) know there are generally programs to help their business save energy. Across both 2013 surveys, businesses that own their facility are significantly more likely than those who lease to know about energy saving programs in general (56% vs. 42%). It is also clear that while levels of awareness about PA sponsored programs have remained consistent across 2013, awareness levels are significantly lower than they were in the fall of 2012 (Aug/Sept – 58%, December 2013 – 46%). This may be the result of changes in campaign strategy that involved a move away from program-specific advertising towards general Mass Save awareness raising efforts.

Figure 11. C&I Customer Awareness of Energy Saving Programs



Note: The general results reflect question A0a: "Prior to this call, did you know that there are programs to help businesses save energy." PA specific results reflect question PA3: "Are you aware of any programs offered by the utilities or energy efficiency service providers in Massachusetts to help their business customers save energy? This might include rebates for upgrading equipment such as lighting or HVAC equipment."

Those C&I customers with general program awareness identified a number of ways that they provide assistance. The most common mentions related to specific rebates or programs (March 2013 – 59%, December 2013 - 44%) including those for lighting, appliances, insulation, HVAC, and water heating. Energy audits (March 2013 – 14%, December 2013 - 24%) and general notions of savings energy along with tips or education were mentioned frequently (March 2013 – 14%, December 2013 - 12%). In addition, there are a number of significant changes since the March 2013 survey such as a decrease in the percentage of customers citing specific rebates or programs (March 2013 – 59%, December 2013 - 44%) and increases in the percentage of customers citing energy audits (March 2013 – 14%, December 2013 - 24%), and reporting that they don't know (March 2013 – 25%, December 2013 - 36%).

Table 23. Types of Assistance Provided by PA Programs among Those Aware (Multiple Response)

Type of Assistance Provided	C&I	
	March 2013 (n=297)	December 2013 (n=182)
Rebates/Programs – Specific	59%**	44%
Energy Audit	14%	24%**
Saving Energy (General)/Education	14%	12%
Low Income/Budget Programs	7%	--
Utility/EE Service Provider	4%	2%
Fuel Assistance/Heat Loans	1%	2%
Tax Incentives	1%	2%
Other	6%	8%
Don't know	25%	36%**

While a significant proportion of those aware of general energy saving programs do not know who sponsors them (March 2013 - 44%, December 2013 – 41%), among those who provided a response in the December 2013 survey, 28% mentioned utilities in general, and 19% mentioned their utility or energy efficiency service provider by name. All other responses were mentioned by small numbers of respondents and classified as "other".

Finally, the proportion of C&I customers who believe that the energy efficiency programs they know about could help their business (44%) has fallen significantly since before the 2013 campaign (55%). However, those who are aware of Mass Save are significantly more likely to view PA energy efficiency programs as helpful to their business (63% compared to 37%). In addition, those who own their facility (58%) are significantly more likely to see a benefit in these programs than those who lease (43%).

Program Participation

Among C&I customers, self-reported participation in PA programs has fallen since the March 2013 survey (47% vs. 31%). Among those who report participating, most cite lighting programs (March 2013 - 56%, December 2013 - 59%), and energy audits or assessments (March 2013 - 16%, December 2013 - 30%). Looking across both the 2013 surveys, restaurant and food related businesses are most likely to have participated (55%), while those in the healthcare sector are the least (33%).

Table 24. C&I Participation in PA Programs among Those Aware (Multiple Response)

Program Type	C&I	
	March 2013 (n=107)	December 2013 (n=44)
Incentives for efficient lighting	56%	59%
Energy Audits or Assessments	16%	30%
Incentives for HVAC	9%	9%
Rebate/loan (unspecified)	4%	9%
Program through Utility (unspecified)	7%	5%

Incentives for renewable energy	-	5%
Other	13%	5%*

* Significant at the 90% level.

Note: Responses with less than 5% were not included.

4.5 Awareness and Knowledge of Other Statewide Brands

This study also explored PA customer awareness and knowledge of two other statewide brands – COOL SMART and GasNetworks. Our exploration of these brands was more extensive in this study than in prior statewide evaluation efforts. As a result, many of the findings provided below are from the December 2013 survey only.

4.5.1 COOL SMART

The COOL SMART program and associated brand target residential customers only. As shown in Table 25, awareness of COOL SMART has been at consistently low levels since February 2012, although there was decline between 2012 and 2013.

Table 25. Awareness of COOL SMART

Survey Period	% of Residential Respondents Aware
February 2012 (n=401)	8%
August/September 2012 (n=402)	7%
March 2013 (n=501)	4%
December 2013 (n=500)	4%

For the first time in the December 2013 survey, the team asked residential customers how they learned about COOL SMART. While nearly a quarter of residential customers who are aware of COOL SMART cannot remember where they learned about the brand, respondents commonly list word of mouth (3/21), TV or news (3/21) and retailers (3/21) as their first source of exposure.

Table 26. How Residential Customers Learned about COOL SMART among Those Aware

Sources of Information about COOL SMART	No. of Residential Customers
	December 2013 (n=21)
Word of Mouth	3
TV/News	3
Retailer/Manufacturer	3
Mail	2
Energy Assessment or Audit	2
Contractor	2
Mass Save website	1
Don't know	5

The majority of customers who are aware of COOL SMART are also unable to draw any associations with the brand (10/21). The most frequently mentioned association is with cooling equipment (4/21) as shown in the figure below. Other common associations with COOL SMART are lighting rebates (3/21) and energy assessments (2/21).

We also asked customers aware with COOL SMART to rate their favorability with the brand after reading them a description. Just over half have a favorable opinion (very favorable - 19% and somewhat favorable - 33%) while 15% hold an unfavorable opinion (somewhat unfavorable - 10% and very unfavorable - 5%). Cumulatively, these findings illustrate that awareness and knowledge of COOL SMART are extremely limited, and associations with the brand are weak.

4.5.2 GasNetworks

Awareness of COOL SMART has been at consistently low levels among both residential and C&I customers since February 2012 (Table 27). However, among those aware of the brand, we explored how they had learned about, their knowledge of it, and their attitudes toward it.

Table 27. Awareness of GasNetworks

Survey Period	% of Residential Respondents Aware	% of C&I Customers Aware
February 2012 (n=314)	4%	6%
August/September 2012 (n=295)	4%	7%
March 2013 (n=456)	4%	6%
December 2013 (n=300)	4%	5%

Residential

Residential customers who are aware of GasNetworks heard about it through the Mass Save website (3/17), television (3/17), a contractor (2/17), word of mouth (2/17) and mail (2/17).

Table 28. How Residential Customers Learned about GasNetworks among Those Aware (Multiple Response)

Sources of Information about GasNetworks	Residential
	December 2013 (n=21)
Mass Save website	3
TV/News	3
Contractor	2
Word of Mouth	2
Mail	2
Other	6
Don't know	3

In addition, nearly a quarter of customers (5/21) who are aware of GasNetworks associate it with utility companies and energy efficiency service providers. Additionally, three respondents associated GasNetworks with gas or energy sources (3/21), and two individuals associated it with rebates and incentives for heating equipment (2/21). Seven respondents did not know what they associated it with and others provided one-off responses.

Despite the lack of knowledge about GasNetworks, almost all of the respondents (16/21) with some awareness had a favorable opinion of the brand (very favorable - 43%, somewhat favorable - 34%) after the team provided them with a program description. The other five did not feel they could provide an opinion.

C&I

Among C&I customers, those aware of GasNetworks report learning about it from a number of sources as shown in Table 29. Given the very small number of respondents, it is difficult to identify trends, however, it appears that market actors such as contractors and suppliers may play an important role in educating C&I customers about the program and associated brand.

Table 29. How C&I Customers Learned about GasNetworks among those Aware (Multiple Response)

Channel	Number of C&I Respondents (n=16)
Contractor	2
Mailer	2
Supplier	2
MassSave website	1
Utility	1
Email	1
Bill Insert	1
Print ad	1
Training class	1
Word of mouth	1
Other	3

C&I customers aware of GasNetworks have a variety of associations with the brand. The most common associations are with third party gas resellers (n=3), followed by the PAs (n=2) and rebates for heating equipment (n=2). However, one quarter of those aware do not report any associations suggesting that awareness may be more limited than initially thought (n=4).

Among those aware of GasNetworks, most C&I customers are at least somewhat favorable towards the program after hearing a description, with only one C&I customer feeling unfavorable. [9]. However, five C&I respondents said they did not know how favorable they feel about the program.

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[9] *"GasNetworks is a collaborative of local gas utilities in Massachusetts that provides rebates and incentives to their customers who install high efficiency heating and water heating equipment. They also provide training to heating contractors on how to install high efficiency equipment and also provide them with training and information on new gas technologies. Based on this general description, do you have a very favorable, somewhat favorable, somewhat unfavorable opinion, or a very unfavorable opinion of GasNetworks?"*

4.6 Customer Information Seeking

In order to better understand where individuals and businesses look for information about energy efficiency, as well as to assess the degree to which they rely on the State, the PAs or Mass Save, we asked respondents where they go for this type of information. As shown in Table 30, we see similar trends among residential and C&I customers. For example, when asked where they would look to learn more about how to lower their energy bills, the majority of customers mention Internet searches through search engines such as Google. However, in both sectors reliance on general Internet searches for information has decreased over time while reliance on the PAs as a source for energy saving information has increased significantly. As shown in Table 30, this is seen in general for residential customers (March 2013 - 12%, December 2013 - 20%) or specific to PA websites for C&I customers (March 2013 - 14%, December 2013 - 20%).

Table 30. Sources of Information about How to Lower Energy Bills (Multiple Response)

Information Source	Residential		C&I	
	March 2013 (n=501)	Dec 2013 (n=500)	March 2013 (n=456)	Dec 2013 (n=300)
Internet search (i.e., Google, Yahoo)	56%**	46%	44%	34%**
Utility/Energy Efficiency Service Provider website	12%	20%**	4%	5%
Utility/Energy Efficiency Service Provider general	3%	4%	14%	20%**
MassSave.com	4%	6%	9%	7%
Utility/Energy Efficiency Service Provider 800 number	2%	6%	1%	1%
Utility bill	3%	4%	--	--
Family/Friends/colleagues	5%	3%	4%	2%
Friends, family, coworkers	5%	3%	4%	2%
Online/Internet (General)	--	--	4%	2%
State/local/federal government agency or website	2%	2%	2%	2%
Trade allies/associations	--	--	2%	1%
Other	13%	9%	11%	14%
Don't know	9%	10%	8%	15%

** Significant at the 95% level.

The team also found that information sources for residential customers vary based on housing status. While renters are more likely to look to general internet searches for information (Renters - 60%, Owners - 46%), owners are more likely to say they would look to MassSave.com (Owners - 7%, Renters - 2%).

Survey questions about organizations that promote energy efficiency also illustrate the relatively strong position that the PAs hold in their residential customer's minds when it comes to energy efficiency. For example, while a slight majority could not name an organization (55%), among those who provided a response, utility companies or energy efficiency service providers were the most frequent (28%) followed by Mass Save (5%) and a mix of other organizations (5%).

Finally, to get a general sense of whether customers feel that they can take actions to save energy, the team asked both residential and C&I customers if they believed they could reduce their energy bills. Based on the December 2013 survey, most residential customers (66%) and half of the C&I customers (49%) believe they could do so. Those who did not think they could reduce their bills cited the fact that they were already doing everything they could (Residential - 32%), that their bills were already low or that they used little energy (Residential - 23%, C&I - 32%), or that they have recently had their business remodeled or had significant upgrades (C&I; 27%).

4.7 Survey Respondent Characteristics

The following sections present the characteristics of those PA customers who participated in the 2013 Umbrella Marketing surveys.

4.7.1 Residential Customers

Table 31 presents the demographics for residential respondents. Where feasible, we also present Massachusetts population data for comparison.

Table 31. Residential Demographics

Demographics	Massachusetts Population [a]	March 2013 (n=501) [d]		December 2013 (n=500) [d]	
		Unweighted	Weighted	Unweighted	Weighted
Ownership					
Own	62%	67%	62%	63%	60%
Rent	38%	32%	37%	34%	37%
Don't know	-	-	-	-	-
Refused	-	1%	1%	3%	3%
Age					
18 to 24	13%	4%	4%	5%	5%
25 to 34	16%	17%	18%	20%	21%
35 to 44	17%	14%	14%	12%	12%
45 to 64	35%	35%	34%	32%	32%
65 and over	18%	22%	21%	21%	21%
Don't know	-	1%	1%	0%	-%
Refused	-	8%	8%	8%	8%
Level of Education [e]					
Less than high school	4%	3%	3%	3%	3%
High school	7%	20%	20%	17%	17%

Demographics	Massachusetts Population [a]	March 2013 (n=501) [d]		December 2013 (n=500) [d]	
		Unweighted	Weighted	Unweighted	Weighted
Some college	27%	22%	22%	21%	20%
Bachelor's degree	19%	29%	22%	27%	27%
Advanced degree	7%	29%	28%	27%	25%
Don't know	21%	-	-	-	-
Refused	14%	5%	5%	6%	6%
Gender					
Male	48%	49%	49%	51%	51%
Female	52%	51%	51%	49%	49%
Household Income [b]					
Under $30,000	-	18%	19%	18%	19%
$30,000 to under $60,000	-	19%	20%	23%	24%
$60,000 to under $100,000	-	20%	20%	19%	18%
$100,000 or more	-	19%	18%	19%	18%
Don't know	-	2%	2%	3%	3%
Refused	-	22%	21%	18%	18%
Utility [c]					
National Grid	-	43%	44%	49%	49%
NSTAR	-	47%	47%	36%	36%
Columbia Gas	-	6%	5%	9%	9%
WMECO	-	7%	7%	6%	6%
Berkshire Gas		3%	3%	2%	2%
New England Gas		2%	3%	1%	1%
Unitil		1%	1%	1%	1%
Other	-	3%	3%	4%	4%
Don't know	-	4%	4%	7%	7%
Refused	-	5%	4%	4%	4%

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

[b] Given question wording, a comparison cannot be made with U.S. 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.

4.7.2 C&I Customers

Table 32 presents the firmographics for the C&I respondents.

Table 32. C&I Firmographics

Firmographics [a]	Feb 2012 (n=314)	Aug/Sept 2012 (n=295)	March 2013 (n=456)	Dec 2013 (n=300)
Ownership				
Owns and occupies this facility	47%	43%	47%	46%
Rents this facility	42%	46%	42%	40%
Owns but rented to someone else	4%	6%	4%	4%
Don't know	4%	2%	2%	2.7%
Refused	3%	3%	5%	6.7%
Natural Gas				
Yes	59%	56%	60%	56%
No	32%	34%	30%	33%
Don't know	9%	8%	7%	7%
Refused	1%	2%	3%	4%
Business Type				
Retail/service	11%	17%	17%	16%
Restaurant or food service	10%	9%	9%	8%
Health care or hospital	8%	5%	8%	4%
Industrial or manufacturing	8%	6%	7%	10%
Office (sales, bank, law firm, etc.)	8%	7%	7%	7%
Automotive/transportation/gas station	8%	6%	6%	5%
Property management agency	7%	8%	5%	5%
Religious/nonprofit organization	6%	5%	4%	7%
Other	33%	32%	34%	34%

Firmographics [a]	Feb 2012 (n=314)	Aug/Sept 2012 (n=295)	March 2013 (n=456)	Dec 2013 (n=300)
Refused	1%	2%	2%	4%
Account Manager				
Yes	16%	13%	14%	15%
No	73%	68%	71%	69%
Don't know	9%	14%	12%	11%
Refused	1%	2%	3%	5%
Employees				
1-10	60%	65%	61%	61%
11-25	15%	20%	14%	13%
26-50	9%	5%	8%	5%
51-100	4%	3%	3%	3%
101-500	4%	1%	4%	4%
More than 500	2%	1%	1%	1%
Don't know	2%	2%	2%	5%
Refused	4%	4%	6%	7%
Square Footage				
Less than 1,000 sq ft	6%	7%	9%	8%
1,000-2,999 sq ft	24%	29%	25%	23%
3,000-5,999 sq ft	11%	11%	11%	13%
6,000-9,999 sq ft	6%	4%	6%	5%
10,000 sq ft or more	17%	17%	14%	14%
Don't know	32%	28%	30%	29%
Refused	4%	3%	6%	9%
Revenue – 2011				
Under $100,000	16%	14%	16%	18%
$100,000 to under $500,000	19%	24%	22%	18%
$500,000 to under $1 million	11%	14%	10%	12%

Firmographics [a]	Feb 2012 (n=314)	Aug/Sept 2012 (n=295)	March 2013 (n=456)	Dec 2013 (n=300)
$1 million to under $5 million	12%	10%	13%	11%
$5 million to under $10 million	4%	2%	3%	1%
$10 million to $20 million	0%	1%	2%	1%
More than $20 million	4%	2%	3%	2%
Don’t know	13%	16%	13%	16%
Refused	20%	17%	19%	21%

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

Appendix A. Data Collection Instruments

December 2013 MA
UM CI Post Survey F

December 2013 MA
UM Gen Pop Survey

For more information, please contact:

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