



MASSACHUSETTS UMBRELLA MARKETING EVALUATION REPORT

Final

Prepared for:

**MASSACHUSETTS PROGRAM ADMINISTRATORS
MASSACHUSETTS ENERGY EFFICIENCY ADVISORY COUNCIL**

Prepared by:

OPINION DYNAMICS CORPORATION

230 Third Avenue
Third Floor
Waltham, MA 02451
(617) 492-1400

www.opiniondynamics.com

Contact: Hannah Arnold, Project Manager

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TABLE OF CONTENTS

- 1. EXECUTIVE SUMMARY 1**
- 2. INTRODUCTION 4**
 - 2.1 Statewide Marketing Campaign Overview..... 4
 - 2.2 Evaluation Approach 5
 - 2.3 Report Structure..... 6
- 3. METHODOLOGY..... 7**
- 4. FINDINGS 12**
 - 4.1 Campaign Knowledge and Awareness 12
 - 4.2 Exposure to Mass Save Marketing 19
 - 4.3 Mass Save Influence on Program Knowledge and Participation 20
 - 4.4 Exposure to Information Sources among Residential Customers 21
 - 4.5 Survey Respondent Characteristics..... 22
- APPENDIX A. DATA COLLECTION INSTRUMENTS 26**
- APPENDIX B. TOPLINE SURVEY RESULTS 42**
- APPENDIX C. C&I CUSTOMER SIZE CLASSIFICATION 43**
- APPENDIX D. INTERIM MEMOS 45**
- APPENDIX E. 2010 INTERIM REPORT 54**

TABLE OF TABLES

Table 2-1. Overview of Evaluation Activities.....	6
Table 3-1. Sample Design and Completed Interviews by Group to Date	7
Table 3-2. General Population Survey Sample Approach.....	9
Table 3-3. Disposition of Targeted Residential Customers.....	9
Table 3-4. General Population Survey Weighting.....	10
Table 3-5. C&I Survey Sample Design	10
Table 3-6. Disposition of Targeted C&I Customers.....	11
Table 3-7. Percentage of Completed Interviews by Customer Size.....	11
Table 4-1. Customer Associations with Mass Save among Those Aware	14
Table 4-2. Perceived Sponsorship of Mass Save among Those Aware of the Effort.....	16
Table 4-3. Aided versus Unaided Awareness of Mass Save	17
Table 4-4. Opinion of Mass Save after Program Description.....	17
Table 4-5. Reasons for Opinion of Mass Save among Those who Offered One (Multiple Response).	18
Table 4-6. MassSave.com Awareness and Use in the Last Six Months	19
Table 4-7. Market Channel Exposure within the Last 6 Months (Multiple Response).....	19
Table 4-8. Residential Knowledge of PA Programs Due to Mass Save Marketing.....	21
Table 4-9. C&I Knowledge of PA Programs Due to Mass Save Marketing.....	21
Table 4-10. Sources Used to Research Energy Efficiency by Residential Customers.....	22
Table 4-11. Residential Demographics	23
Table 4-12. C&I Firmographics	24
Table 4-13. Percentage of Completed Interviews by Customer Size.....	44

TABLE OF FIGURES

Figure 4-1. General Program Awareness and Mass Save Familiarity among Residential Customers 13

Figure 4-2. General Program Awareness and Mass Save Familiarity among C&I Customers 13

Figure 4-3. Aided Association among Residential Customers Aware of Mass Save 15

1. EXECUTIVE SUMMARY

In 2012, the Massachusetts-based energy efficiency Program Administrators (PAs) continued coordinating a statewide umbrella marketing effort, under the trademark of Mass Save®. This coordinated umbrella marketing effort is in its third program year. This report presents findings from the Opinion Dynamics evaluation team's 2011 evaluation activities, which were designed to establish baseline campaign awareness in advance of the 2012 marketing campaign. The report also builds upon an interim evaluation of the 2010 Massachusetts Umbrella Mass Save Statewide Marketing Campaign, which focused on documenting the campaign's organizational structure and initial strategy.¹ We include and reference this past research in this evaluation report as appropriate.

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 in the past 6 months. 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.² 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%).

¹ In 2010, the evaluation team conducted a preliminary evaluation of the effort based on initial interviews with the PAs, program implementers, and key stakeholders. We also presented baseline information gathered through secondary research.

² The team fielded the survey in February 2012.

Executive Summary

- 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%).³
- 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:⁴

- 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.

³ We asked respondents if they associated Mass Save with a set of specific response categories.

⁴ Memos outlining the results from in-depth interviews with C&I customers, as well as residential focus groups are included in the Appendices.

Executive Summary

- 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.

To further assess the impact of the Umbrella Marketing Campaign, the Opinion Dynamics evaluation team anticipates conducting a post-campaign survey effort to measure exposure to 2012 campaign messaging and its impact on Mass Save awareness.

2. INTRODUCTION

The primary goal of this evaluation is to establish baseline Mass Save awareness prior to the launch of the 2012 Massachusetts Umbrella Mass Save Statewide Marketing Campaign (Umbrella Marketing or Statewide Marketing Campaign). As such, this report presents the results of residential and C&I quantitative surveys conducted as part of the Massachusetts Umbrella Marketing Evaluation. Throughout this report and in the Appendices, we also provide insights on the administration of the Statewide Marketing Campaign and awareness of Mass Save based on residential focus groups and in-depth interviews with business customers. This research is intended to enable the PAs to track changes in Mass Save awareness over time.

2.1 STATEWIDE MARKETING CAMPAIGN OVERVIEW

The ultimate goal of the Massachusetts Umbrella Marketing Campaign is to raise customer awareness of energy efficiency programs and energy saving opportunities so that they install energy efficient equipment through PA programs and/or change behaviors. The specific goals of this program are (1) to educate audiences about the need for and benefits of energy efficiency, (2) to increase awareness of Mass Save, and (3) to drive Massachusetts residents to participate in sponsored energy efficiency programs.⁵ The campaign also has market-level goals which include the installation of equipment or changes in behaviors that occur outside of the program efforts. This program does not have explicit energy saving goals.

The campaign is designed and implemented by a team of stakeholders including representatives from each of the PAs, as well as implementation contractors such as Pixel Media, the Cadmus Group, Marketing Drive, Blitz media and Wedo.⁶ The Massachusetts Department of Energy Resources (DOER) has also played a role in the umbrella marketing effort. In 2010, DOER served as an advisor and subsequently, the PAs have kept the Department informed of Mass Save statewide marketing activities.

The History of Umbrella Marketing (2010 to present)

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 a result, it is important to place the baseline results presented in this report within the context of prior campaign activity.

In 2010, the campaign implemented two key efforts: the Mass Save website and a multifaceted media campaign:⁷

⁵ The Cadmus Group, Inc. / Energy Services. "Massachusetts Statewide Education, Marketing and Outreach Working Coalition – RFP 306. January 29, 2010.

⁶ These groups replaced causemedia and the Shelton Group, two other implementers involved in 2010.

⁷ Detailed information about the 2010 Mass Save Statewide Marketing Campaign is available in the Massachusetts Umbrella Marketing Interim Evaluation Report (Appendix E).

- **Mass Save Website:** This website, used by all of the PAs, is designed to serve as the primary repository for residential and commercial energy efficiency program information across the state. It is also intended to serve as a resource for market actors in this field. The website became part of the umbrella marketing effort in the summer of 2010.
- **Multifaceted Media Campaign:** The PAs used multiple promotional tactics and media channels to educate customers, raise awareness and encourage participation in PA programs, either directly or by driving traffic to the Mass Save website.

Overall, there was a significant change in the umbrella marketing strategy between 2010 and 2011. The residential effort shifted from a general awareness campaign targeted at specific customer segments to a program-focused marketing effort, while the C&I effort was introduced and became more defined in its approach.

- On the residential side, the 2011 materials focused on providing directions for energy efficiency program participation and the purchase of efficient appliances, with almost all materials directing consumers to action. In addition, the campaign regularly mentioned PA sponsors by name creating an equal focus on their brands.
- The C&I effort expanded and became more defined in its approach. In particular, the PAs used targeted advertising and Internet based networks like LinkedIn to increase awareness of Sponsor's C&I programs. In general, the marketing approach for the C&I sector was less program and measure-specific, and more focused on demonstrating the merits of energy efficiency overall. While not the focus, C&I materials still referenced specific equipment and provided information on various technologies to develop interest among PA customers.

Statewide marketing to business customers, which began in earnest in 2011,⁸ has occurred on a much smaller scale compared to residential customers. In 2012, campaign efforts targeted to both sectors will continue, although the strategy employed may change based on the experience of the implementers and sponsors in 2011.

2.2 EVALUATION APPROACH

The team utilized a number of different data collection strategies to support this evaluation of the Massachusetts Umbrella Marketing Campaign. Table 2-1 below provides a synopsis of the key data collection efforts implemented to support the evaluation.

⁸ Limited 2010 activities included C&I Awards and the development of business focused content on MassSave.com.

Table 2-1. Overview of Evaluation Activities

Evaluation Task	Details
Review of 2011 marketing materials and plans	Provides insight into campaign goals, marketing channels and tactics used, and materials that customers have been exposed to.
Interviews with C&I customers (n=23)	Used to assess customer awareness of Mass Save, exposure to and perceptions of Mass Save marketing efforts, and information-seeking behavior. Used to test potential quantitative survey questions.
Focus groups with residential customers (n=4)	Provides insight into residential customers' awareness of the Mass Save campaign and examine how customers who have been exposed to both Mass Save and PA specific' marketing perceive and distinguish between the two types of program messaging. Used to test quantitative survey questions.
C&I Quantitative Survey (n=314)	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.
General Population Quantitative Survey (n=401)	

2.3 REPORT STRUCTURE

This report includes four chapters and five appendices. Chapters 1 and 2 include the executive summary and introduction. Chapter 3 presents the methodology used to conduct the study, and Chapter 4 contains the results of our research. The appendices contain data collection instruments, topline survey results, and past evaluation research.

3. METHODOLOGY

This study draws on data from three different collection methods: focus groups, in-depth interviews, and structured quantitative telephone surveys. Below, we provide an overview of each of the methods used in this evaluation.

3.1.1 RESIDENTIAL FOCUS GROUPS

As part of the Umbrella Marketing Evaluation effort, the evaluation team conducted focus groups with residential customers to assess their awareness of the Mass Save Umbrella Marketing Campaign and examine how customers who have been exposed to both Mass Save and PA-specific marketing perceive and distinguish between the two types of program messaging.

To assess relative exposure to Mass Save messages across Massachusetts, we held two focus groups with non-participants and two groups with program participants from across the state. We focused on geographic areas where customers received electric service from NSTAR or National Grid and gas service from the other company, as well as areas where customers received electric service from a large PA and gas service from a smaller PA. Based on these criteria, we chose to conduct the groups in Springfield and Boston on January 24 and 25, 2012. Appendix D contains additional information on the focus groups.

3.1.2 C&I IN-DEPTH INTERVIEWS

Opinion Dynamics conducted 23 interviews with small and medium C&I customers in Massachusetts. The team employed a random sampling approach using data from PA customer lists. We also set quotas based on business size (small or medium) and geography (Eastern or Western Massachusetts). We determined business size based on annual demand data and eligibility requirements for the Small C&I Direct Install Program (ex. less than 300 kW in annual demand is small and 300-750 kW is medium). When annual demand data was not available, respondents were asked to self-classify during the interview based on questions about annual revenue, number of employees and whether or not they had a utility account representative.

Table 3-1 shows the number of completed interviews in each of the four target groups.

Table 3-1. Sample Design and Completed Interviews by Group to Date

Business Size	Small Businesses		Medium Businesses		Total
	Eastern MA	Western MA	Eastern MA	Western MA	
Completed Interviews	8	8	3	4	23

The goal of the interviews was to gain insight into customer awareness of Mass Save, exposure to and awareness of Mass Save marketing efforts, information-seeking behavior, and information about past program participation. This initial effort also allowed us to pre-test quantitative survey questions fielded as part of the survey effort described below. See Appendix D for additional information about this activity.

3.1.3 QUANTITATIVE TELEPHONE SURVEYS

The evaluation team implemented Computer-Assisted Telephone Interviewing (CATI) telephone surveys with a sample of residential and C&I customers in February 2012. We selected the sample of customers from data provided by the PAs in fall 2010 to both the Residential Retrofit Evaluation Team and the Non-Residential Small Business Evaluation Team. 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 401 residential PA customers. The survey was designed to enhance understanding of residential awareness of Mass Save, as well as exposure to Mass Save marketing efforts. We fielded the survey between February 16 and 28, 2012 to establish baseline levels of awareness before the March launch of the 2012 Umbrella 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 3-2) in proportion to their representation in the overall population to ensure that the sample was representative of the overall customer base.

The total number of interviews, shown in Table 3-2, provides results at 90% confidence and 4% precision at the statewide level.

Table 3-2. General Population Survey Sample Approach

Residential Customers	Sample Frame		Completed Interviews	
	#	%	#	%
Bay State Gas-NGRID	6,851	0.3%	1	0.2%
Bay State Gas-NSTAR	2,021	0.1%	0	0.0%
Bay State Gas-WMECO	3,390	0.2%	0	0.0%
Bay State Gas	25,152	1.2%	5	1.2%
Berkshire-NGRID	2,849	0.1%	0	0.0%
Berkshire	9,797	0.4%	2	0.5%
Berkshire-WMECO	9,762	0.4%	2	0.5%
WMECO	142,004	6.5%	26	6.5%
CLC-NGRID	42,101	1.9%	9	2.2%
CLC	132,436	6.1%	24	6.0%
NGRID-New England Gas	15,749	0.7%	1	0.2%
NSTAR-New England Gas	1,269	0.1%	0	0.0%
NGRID-Unitil	505	0.0%	0	0.0%
Unitil	27,616	1.3%	6	1.5%
NGRID-NSTAR	182,019	8.4%	34	8.5%
NGRID	954,319	43.8%	177	44.1%
NSTAR	599,308	27.5%	110	27.4%
New England Gas	22,375	1.0%	4	1.0%
Total	2,179,523	100%	401	100%

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).⁹ Overall, the effort resulted in a response rate of 4%.

Table 3-3. Disposition of Targeted Residential Customers

Disposition	Customers	%
Completed Survey	407	2%
Unable to reach	8,878	53%
Refusal	4,559	27%
Telephone number issue	3,065	18%
Total	16,909	100%

⁹ Standard Definitions: Final Dispositions of Case Codes and Outcome Rates for Surveys, AAPOR, 2009. http://www.aapor.org/Standard_Definitions/2852.htm.

Weighting

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.

Table 3-4. General Population Survey Weighting

	Massachusetts Population	Unweighted Gen Pop Data	Home Weight
	%	%	
Own	62%	74%	0.8397
Rent	38%	26%	1.4586

Commercial & Industrial Customer Survey

Opinion Dynamics conducted a telephone survey among PA business customers. The goal of the survey was to gather information about exposure to and awareness of Mass Save, customer preferences in terms of marketing and outreach, the effectiveness of calls to action, and the influence of Mass Save marketing on participation in PA programs. Our team surveyed a simple random sample of 314 PA C&I customers in February 2012. We timed the fielding of the survey to take place prior to the launch of the 2012 marketing campaign.

We based the sample of C&I customers on files that the PAs provided to the Non-Residential Small Business Evaluation Team in 2010. The total number of completed interviews shown in Table 3-5 provides results at 90% confidence and 5% precision.

Table 3-5. C&I Survey Sample Design

C&I Customers	Population ^a	Sample Frame	Sample	Completed Interviews
Total	451,568	213,140	11,523	314

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

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 AAPOR.¹⁰ Overall, the effort resulted in a response rate of 5%.

¹⁰ Ibid.

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

Disposition	Customers	%
Completed Survey	315	3%
Unable to reach	3,678	32%
Refusal	4,392	38%
Telephone number issue	3,138	27%
Total	11,523	100%

Customer Size

In determining the sample approach for the quantitative survey with commercial customers, the team, PA representatives, and Energy Efficiency Advisory Council (EEAC) Consultants discussed the possibility of drawing a stratified sample based on customer size. Appendix C outlines why this was not possible, as well as the approach taken to gather customer size data through the quantitative survey. Ultimately, the team, in coordination with the Non-Residential Large Business evaluation team decided to use a combination of Account Representative and employee data to classify businesses.

Below, we present the total number of completed interviews by customer size based on the two survey-based approaches described in Appendix C. Regardless of the method used, we completed the majority of PA interviews with small business customers.

Table 3-7. Percentage of Completed Interviews by Customer Size

Customer Size	Account Representative Based		Employee Based	
	#	%	#	%
Small	263	84%	189	60%
Medium	--	--	74	24%
Large	51	16%	33	11%
Don't Know	--*	--	18	6%
Total	314	100%	314	100%

*Note: Those respondents who did not know whether they had an Account Representative are assumed to be small.

Further, we found no statistically significant differences in responses between the large and small size groups on key variables of interest. As a result, throughout the report we only present findings for C&I customers overall.

Weighting

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

4. FINDINGS

This section of the report presents findings from the residential and C&I quantitative surveys, which were designed to help assess the impact of the Umbrella Marketing Campaign over time. In particular, the team explored customer exposure to and awareness of Mass Save, and the influence of Mass Save marketing on participation in PA programs. In addition, we include data from the residential focus groups and C&I in-depth interviews to provide context.

4.1 CAMPAIGN KNOWLEDGE AND AWARENESS

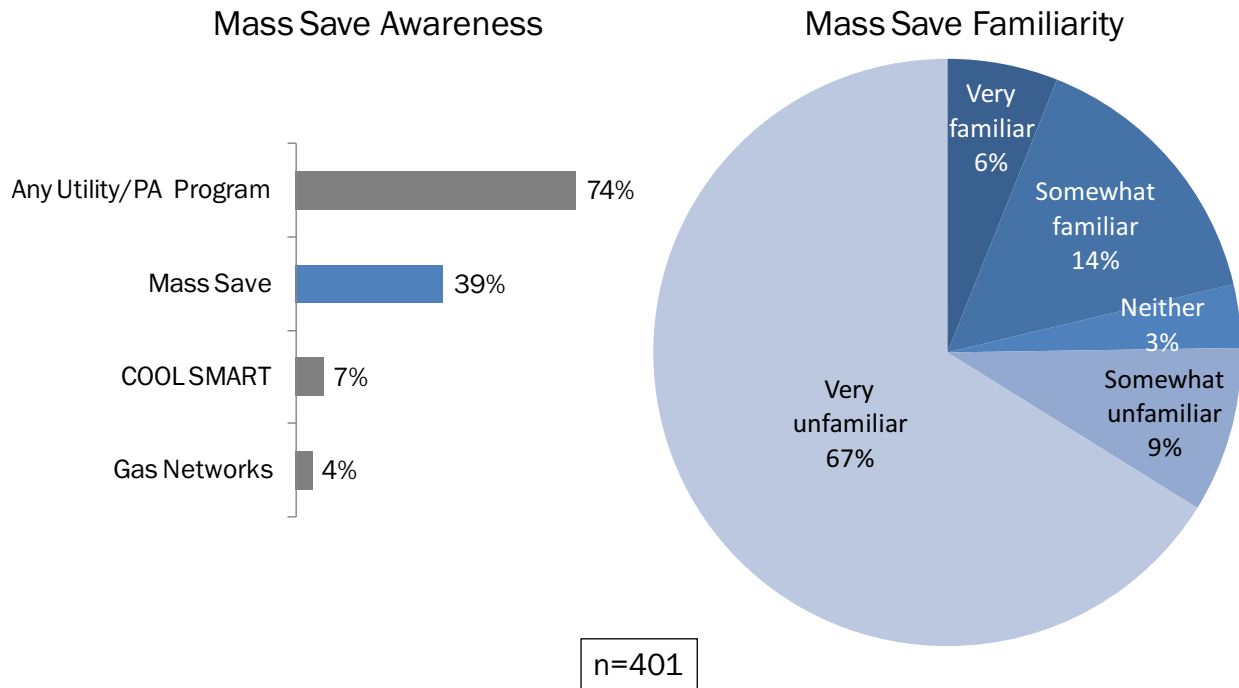
4.1.1 GENERAL MASS SAVE AWARENESS

Awareness of Mass Save is moderate among both residential and C&I respondents. Just over one third of residential (39%) and C&I customers (33%) said they had heard the term Mass Save (Figure 4-1 and Figure 4-2). In addition, familiarity with the campaign is moderate among those aware of Mass Save. For example, half of those aware of the campaign consider themselves at least somewhat familiar (49% residential, 47% C&I) and among all surveyed participants approximately 20% of residential respondents and 16% of C&I respondents are at least somewhat familiar with Mass Save.

The residential findings are generally consistent with the results from an April 2010 survey of residential customers conducted by the campaign implementer.¹¹ That survey indicated that 36% of residential customers had some level of familiarity with the term “Mass Save” and that only 18% of residential respondents considered themselves very or somewhat familiar with Mass Save.

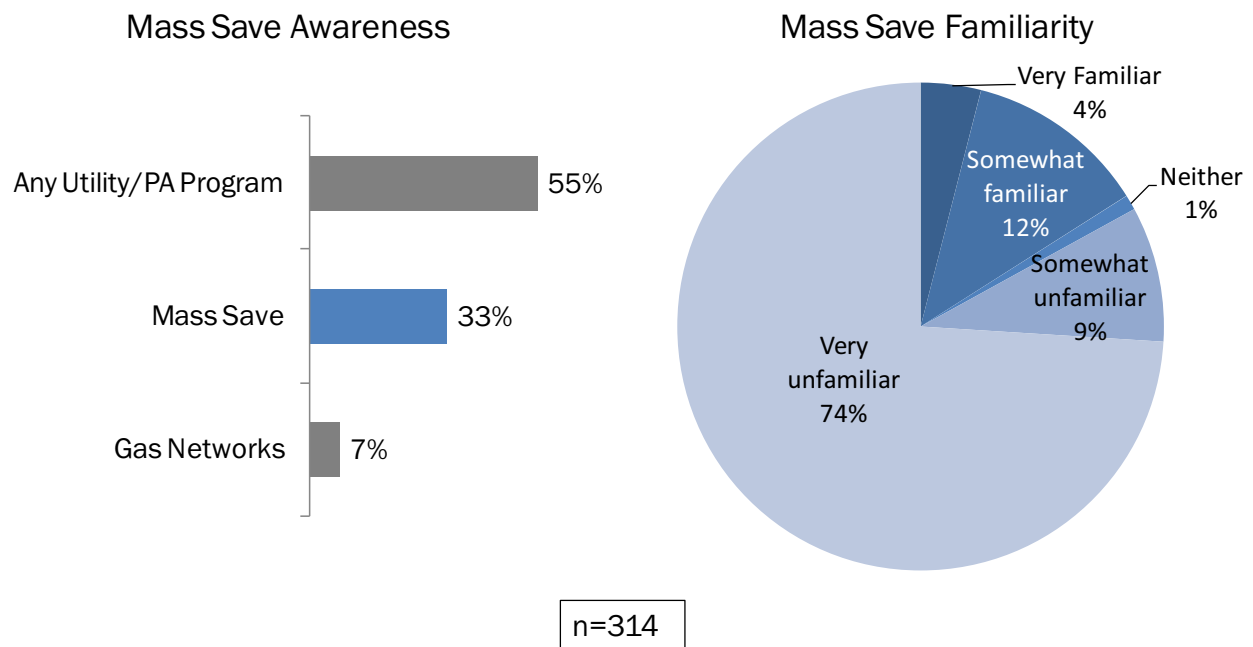
¹¹ The Massachusetts Statewide Residential Energy Efficiency Survey, was conducted by the Shelton Group, and was completed by 400 randomly selected respondents who indicated that they were responsible for utility bill payments and decisions about home improvements.

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



Note: Respondents who were 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



Note: Respondents who were not aware of Mass Save are considered “very unfamiliar.”

In addition, while C&I customers have the potential for exposure to campaign messaging aimed at both the residential and business sectors, survey findings indicate that C&I customers do see Mass Save as a resource for their businesses. More specifically, almost half of C&I respondents (47%) said that Mass Save offers solutions for both their business and home.

As shown Figure 4-1 and Figure 4-2, awareness of Mass Save exceeds that of other statewide or regional PA programs and brand names such as Gas Networks and COOL SMART. However, customers have the greatest levels of awareness around incentive or rebate programs offered by the PAs.¹²

The residential focus groups also suggest that awareness of Mass Save may differ by geographic location. For example, the majority of customers that participated in Springfield focus groups were aware of Mass Save without prompting, while those in Boston were not. Further, Springfield customers tended to associate it with energy audits offered by local utilities. Boston customers were not sure of the purpose of Mass Save and often assumed that it was a program administered by the government (see Appendix D). Below, we further discuss knowledge and perceptions of Mass Save.

4.1.2 KNOWLEDGE AND PERCEPTIONS OF MASS SAVE

Campaign Associations

Both residential and C&I customers overwhelmingly associate Mass Save with energy. Table 4-1 illustrates the frequency with which respondents mentioned 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, 87% of residential and 96% of C&I participants responded affirmatively.

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

Associated with Mass Save	Residential	C&I
	(n=180)	(n=105)
Energy efficiency and reducing energy bills	21%	22%
Energy assessment or audit	17%	22%
Resource for energy information	13%	7%
Energy saving programs/home improvements	12%	
Rebates/saving money general	12%	11%
Related concepts (i.e., recycling, energy)	9%	7%
Rebates/incentives for appliances	8%	
Utility/PA companies	8%	9%
Rebates/incentives for insulation	6%	

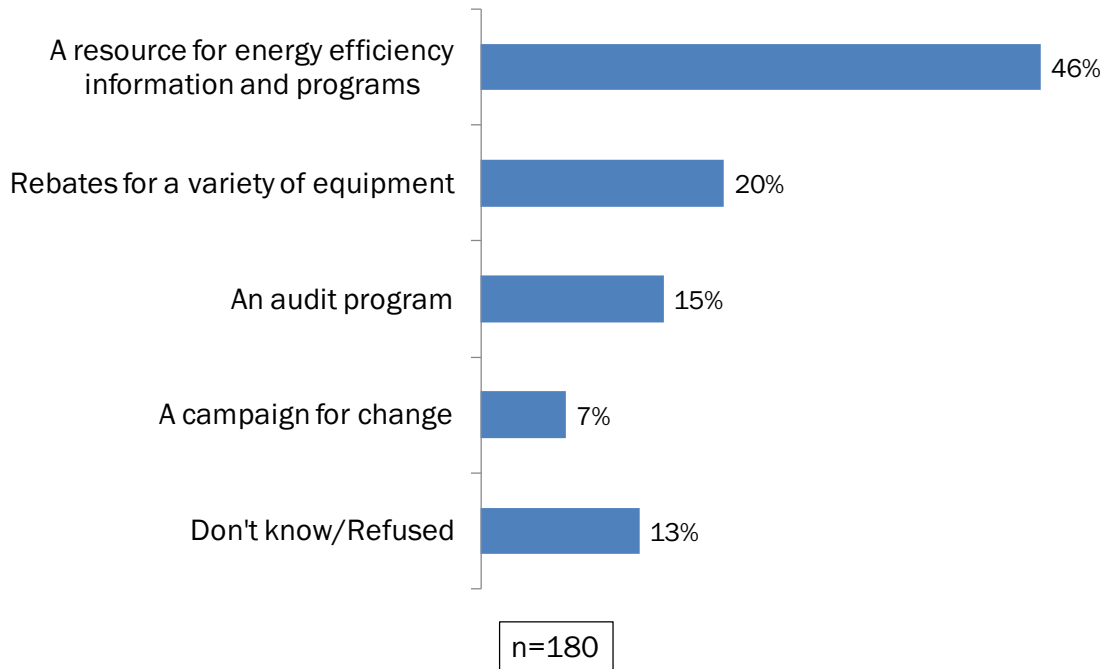
¹² We also utilized the residential quantitative survey to further explore awareness of energy efficiency opportunities more generally among residential respondents. We found that residential customers frequently report being aware of tax credits for energy efficient home improvements (81%), home energy assessments (79%), and the presence of information about how to save energy on electric or gas energy efficiency service provider websites (72%).

Associated with Mass Save	Residential	C&I
Rebates/incentives for lighting/controls	5%	5%
State government	5%	5%
Rebates/incentives for HVAC equipment	5%	2%
Negative association with Mass Save	3%	
Advertisements	1%	4%
Website	1%	1%
Rebates/incentives for Custom projects		1%
(Other)	8%	3%
(Don't know)	14%	14%

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

When provided with a list of descriptors and asked to select the one that they *most* associate with Mass Save, residential customers most associated Mass Save with “a resource for energy efficiency information and programs” (46%) followed by “rebates for a variety of equipment” (20%). As shown in Figure 4-3, despite concerns among PA program and evaluation staff about the lingering association with the PA’s Home Energy Services Program, formerly known as Mass Save, only 15% of residential customers most associated Mass Save with an audit program.

Figure 4-3. Aided Association among Residential Customers Aware of Mass Save



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

C&I customers most frequently said they *most* associated Mass Save with “rebates for a variety of equipment” (46%) followed by “an audit program” (31%).

Sponsorship of Mass Save

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 (52% among residential and 53% among commercial) while another 28% of residential and commercial customers could not name any organizations they thought 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
	(n=180)	(n=105)
Utility or PA company/companies	52%	53%
State government	9%	10%
Environmental non-profits or NGOs	4%	4%
Retailers/manufacturers (i.e., GE, local businesses)	3%	-
Federal government (i.e., Dept of Energy)	3%	-
(Other)	8%	7%
(Don't know)	28%	28%

The team saw uncertainty about the campaign’s sponsorship within the residential focus groups as well. When presented with past Mass Save advertising, many participants voiced confusion about who was behind Mass Save and what their motivation was. However, it is important to note that the presence of PA logos, as well as copy that explained the effort, generated positive feelings among participants. Customers also generally preferred to see either all of the utility logos presented with Mass Save or none of them.¹³ Those who had a positive perception of their utility said they did not mind seeing only that logo along with Mass Save, but the presence of all the utility logos made people feel positive about the partnership and Mass Save (Appendix D).

Aided Awareness and Perceptions

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.

¹³ While some of the 2011 Mass Save marketing materials did not include all PA logos, the evaluation team understands that in 2012, the PAs took steps to permanently include all PA logos on statewide marketing materials going forward.

Based on this information, awareness of Mass Save rose substantially among C&I respondents. As shown in Table 4-3 below, while 33% of C&I customers were aware of the term “Mass Save” before it had been explained, 47% reported being aware once it was described. Among residential customers, the difference between aided and unaided awareness is much smaller. For example, 39% recalled the term before it had been explained and 40% said they were aware of it after it had been described.¹⁴

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

Aware of Mass Save	Residential		C&I	
	(n=401)		(n=314)	
	Unaided	Aided	Unaided	Aided
Yes	39%	40%	33%	47%
No	57%	59%	66%	53%
Don't Know / Refused	3%	2%	1%	-

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

In general, the majority of respondents had a favorable opinion of the campaign based on the description; 84% of residential respondents and 75% of C&I respondents reported 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
	(n=401)	(n=314)
Very favorable	35%	29%
Somewhat favorable	49%	46%
Somewhat unfavorable	2%	3%
Very unfavorable	1%	3%
Don't know/ Refused	13%	20%

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

A number of factors drive the favorable opinions of Mass Save. In particular, positive feelings about saving energy (27%) and money (22%), positive feelings about the program in general (22%), positive past experience with this or similar programs (9%), and positive feelings about educating/informing the public (8%) are the top reasons cited by residential respondents. As shown in Table 4-5 below, business customers also share these sentiments.

¹⁴ 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 4-5. Reasons for Opinion of Mass Save among Those who Offered One (Multiple Response)

Reasons	Residential	C&I
	(n=347)	(n=252)
Positive		
Positive feelings about saving energy	27%	18%
Positive feelings about saving money	22%	28%
Positive feelings about program in general (good idea, like products, etc)	22%	24%
Past experience – positive	9%	11%
Positive feelings about educating/informing the public	8%	
Positive feelings about helping improve homes	7%	
Positive feelings about helping those in need	5%	5%
Positive feelings about protecting the environment	4%	5%
Negative		
Limited awareness of programs and services	18%	15%
(Negative feelings/experience with the programs, products, or services)	17%	16%
Neutral/Other		
No real feelings about it	1%	2%
Other	2%	2%
Don't know	5%	8%

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 team also explored awareness of MassSave.com, the key web resource used by the campaign. As shown in Table 4-6, awareness of MassSave.com is moderate among both residential (17%) and C&I customers (17%). Further, of those who are aware of the website, about a third (37% of residential and commercial) had visited the site at least once in the past six months.

Table 4-6. MassSave.com Awareness and Use in the Last Six Months

Awareness & Use of Masssave.com	Website Visits	Residential	C&I
		(n=401)	(n=314)
Aware and used	Once	3%	2%
	2-5 times	3%	4%
	6-10 times	0%	0%
	11 or more	0%	0%
Aware, but not used	None	11%	11%
Not aware of Masssave.com	NA	83%	83%

4.2 EXPOSURE TO MASS SAVE MARKETING

To assess the reach of past marketing efforts, we asked both residential and C&I respondents about their exposure to Mass Save via a variety of different marketing channels used by the campaign in 2011. Table 4-7 shows the percentage of participants who heard of Mass Save through each channel within the last six months.

Table 4-7. Market Channel Exposure within the Last 6 Months (Multiple Response)

Campaign Channel	Residential	C&I
	(n=401)	(n=314)
Any Channel - Ever	34%	28%
Any Channel - Past 6 Months	22%	21%
Bill Insert	13%	6%
Mailer	9%	7%
Print Ad	7%	5%
Radio Ad	7%	9%
MassSave.com	4%	6%
Newspaper Article	4%	5%
Mass Transit	3%	
Billboard	3%	
Online Ad	3%	3%
Email	2%	
Public Event	1%	1%
Case Study		2%

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

The channel where most residential participants recall seeing Mass Save information is bill inserts (13%), followed by a separate mailer (9%), print ads (7%), radio advertisements (7%), and Mass Save.com (4%).

C&I participants responded differently, reporting that radio advertisements are the most frequent

source of information (9%), followed by mailers (7%), Mass Save.com (6%), bill inserts (6%), newspaper articles (5%), and print advertisements (5%).¹⁵ Given differences in the level of targeting and types of outreach employed by the Umbrella Marketing Campaign, we expect these types of differences between residential and C&I exposure.

In looking at the C&I results, it is also worth noting the potential for the spillover of residential marketing efforts to the C&I sector. For example, radio advertising was not implemented in 2011 as part of the C&I outreach approach, yet almost a third of respondents said they heard about Mass Save via radio in the past six months when asked to think specifically about Mass Save as it relates to their business.

Anecdotal information gathered through residential focus group research helps to provide additional insight into the effectiveness of these campaign channels, as well as the types of advertising presented. For example, residential focus group participants stated that program-specific marketing would be more effective than general outreach. However, some said that this program-specific approach would only interest them if they were actively looking for the specific measure addressed in the advertisement, and they would not necessarily be interested otherwise.

In addition to the marketing channels used by the Umbrella Marketing Campaign to reach PA customers, informal networks also play a role in educating Massachusetts residents about the Mass Save. For example, participants in the focus groups and C&I in-depth interviews mentioned hearing about Mass Save through word-of-mouth and personal interaction. As one in-depth interview participant noted:

This industry is a lot of word of mouth, a lot of initiatives and programs and decisions that we make in regards to anything you know comes from what has worked for other individuals, other properties, other management groups, and that's probably the most valuable resource.

4.3 MASS SAVE INFLUENCE ON PROGRAM KNOWLEDGE AND PARTICIPATION

Overall, 38% of residential customers reported ever participating in a PA program, and 27% of those said their participation took place within the past year (10% of all respondents). Among those who self-reported program participation in 2011, approximately one-third could not recall or declined to indicate whether they decided to participate before or after seeing Mass Save advertisements. Sixteen respondents said they decided to participate in a program after seeing the Mass Save advertisements while six decided to participate before exposure to the marketing effort. As such, past Mass Save efforts may have encouraged some participation (16 of 401 respondents).

¹⁵ 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. Residential Knowledge of PA Programs Due to Mass Save Marketing

	Percent of All Respondents (n=401)
Aware of PA programs ^a	74%
Aware of Mass Save	39%
Exposed to <i>any</i> Mass Save marketing <u>in the past 6 months</u>	22%
Participated in a PA program within the past year	10%
Participated after seeing Mass Save advertisements ^b	4%

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

^b Thirty five percent (35%) of respondents did not know or refused to provide information about past program participation.

When discussed in focus group sessions, customers in all sessions generally felt that the Mass Save advertising was trying to get them to participate in an energy efficiency program and to some degree direct them to information about how to save energy.

Given that the C&I marketing campaign is in its infancy, we took a more general approach and asked respondents with knowledge of PA programs whether they heard about them through Mass Save advertisements.¹⁶ As shown in Table 4-9, overall, slightly more than half of the C&I customers with whom we spoke were aware that the PAs offered programs to help businesses save energy. However, only a small percentage of these customers had heard about the PA programs through the Mass Save advertisements they had seen.

Table 4-9. C&I Knowledge of PA Programs Due to Mass Save Marketing

	Percent of All Respondents (n=314)
Aware of PA programs	55%
Aware of Mass Save	33%
Exposed to <i>any</i> Mass Save marketing <u>in the past 6 months</u>	21%
Participated in a PA program	25%
Heard about programs via Mass Save Advertisements	7%

As expected, these findings indicate that Mass Save is not yet a key driver of program participation. There is opportunity for the campaign to continue its work to educate customers about PA programs.

4.4 EXPOSURE TO INFORMATION SOURCES AMONG RESIDENTIAL CUSTOMERS

To provide context around the environment in which the PAs promote Mass Save, as well as the information-seeking behavior of the 2012 campaign's residential target audience, we explored customer exposure to various sources of information on energy efficiency. Overall, we found that residential customers have little knowledge of organizations promoting energy efficiency. For

¹⁶ This question was asked only of those who reported seeing Mass Save advertising.

example, 50% could not name any. However, 31% see utility companies or energy efficiency service providers promoting this issue, overwhelmingly more than any other channel. Only 4% of residential respondents mentioned Mass Save as an entity promoting energy efficiency.¹⁷

We further explored information-seeking behavior by asking residential respondents where they would look if they wanted more information about energy efficiency. As shown in Table 4-10, residential customers mentioned a general Internet search most often and far more frequently than any other channel (64%). The Mass Save website ranks sixth in the list of potential information sources below Internet search, utility website (11%), newspapers and magazines (6%), and PA/utility or utility bill, and family and friends (5%). These survey results are similar to the sources of information mentioned by the residential focus group participants.

**Table 4-10. Sources Used to Research Energy Efficiency by Residential Customers
(Multiple Response; Unaided)**

Information Source	Residential (n=401)
Internet search (i.e., Google, Yahoo)	64%
Utility/Energy Efficiency Service Provider Website	11%
Newspaper/magazine	6%
Utility or PA company/utility bill	5%
Friends, family, or colleagues	5%
Mass Save website	4%

In general, when asked about telephone numbers that the respondent might use to find additional information about how to save energy, residential customers report that they are unlikely to call anyone (39%). However, 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 (15%).

Stated preferences among residential customers for methods of receiving information rank direct mail (43%) and email (28%) the highest. Of all residential customers, 12% do not want any information about programs.

4.5 SURVEY RESPONDENT CHARACTERISTICS

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

4.5.1 RESIDENTIAL CUSTOMERS

Table 4-11 presents the demographics for residential respondents. Where feasible, we also present Massachusetts population data for comparison.

¹⁷ This multiple response question asked respondents, “What organizations are you aware of that are in the market place promoting energy efficiency?”

Table 4-11. Residential Demographics

Demographics	Massachusetts Population ^a	Percentage of Respondents (n=401) ^d	
		Unweighted	Weighted
Ownership			
Own	62%	72%	61%
Rent	38%	25%	37%
Don't know	-	1%	1%
Refused	-	1%	1%
Age			
18 to 24	13%	3%	3%
25 to 34	16%	15%	18%
35 to 44	17%	11%	11%
45 to 64	35%	38%	37%
65 and over	18%	23%	22%
Don't know	-		0%
Refused	-	10%	10%
Level of Education ^e			
Less than high school	4%	2%	2%
High school	7%	13%	14%
Some college	27%	20%	21%
Bachelor's degree	19%	29%	29%
Advanced degree	7%	29%	29%
Don't know	21%	0%	0%
Refused	14%	6%	6%
Gender			
Male	48%	55%	55%
Female	52%	45%	45%
Household Income ^b			
Under \$30,000	-	13%	15%
\$30,000 to under \$60,000	-	15%	17%
\$60,000 to under \$100,000	-	22%	21%
\$100,000 or more	-	23%	21%
Don't know	-	2%	2%
Refused	-	25%	24%
Utility ^c			
National Grid	-	49%	49%
NSTAR	-	43%	44%
Columbia Gas	-	7%	7%

Demographics	Massachusetts Population ^a	Percentage of Respondents (n=401) ^d	
WMECO	-	6%	6%
Other	-	7%	7%
(Don't know)	-	4%	4%
(Refused)	-	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 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 4-12 presents the firmographics for the C&I respondents.

Table 4-12. C&I Firmographics

Firmographics	Percentage of Respondents (n=314) ^a
Ownership	
Owns and occupies this facility	47%
Owns but rented to someone else	4%
Rents this facility	42%
Don't know	4%
Refused	3%
Natural Gas	
Yes	59%
No	32%
Don't know	9%
Refused	1%
Business Type	
Retail/service	11%
Restaurant or food service	10%
Health care or hospital	8%
Industrial or manufacturing	8%
Office sales, bank, law firm, etc.	8%
Automotive/transportation/gas station	8%
Religious/non-profit organization	7%
Property management agency	6%
Other	33%
Refused	1%

Firmographics	Percentage of Respondents (n=314) ^a
Account Manager	
Yes	16%
No	73%
Don't know	9%
Refused	1%
Employees	
1-10	60%
11-25	15%
26-50	9%
51-100	4%
101-500	4%
More than 500	2%
Don't know	2%
Refused	4%
Square Footage	
Less than 1000 sq ft	6%
1000-2999 sq ft	24%
3000-5999 sq ft	11%
6000-9999 sq ft	6%
10000 sq ft or more	17%
Don't know	32%
Refused	4%
Revenue - 2011	
Under \$100,000	16%
\$100,000 to under \$500,000	19%
\$500,000 to under \$1 million	11%
\$1 million to under \$5 million	12%
\$5 million to under \$10 million	4%
\$10 million to \$20 million	0%
More than \$20 million	4%
Don't know	13%
Refused	20%

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

Appendix A. DATA COLLECTION INSTRUMENTS

Massachusetts Umbrella Marketing Evaluation

Residential General Population Survey Instrument

February 17, 2012

*Reviewer Note: Many questions within this survey are drawn from two previously fielded survey instruments: the Massachusetts Statewide Energy Efficiency Consumer Telephone Study (Shelton Group) and the Massachusetts Energy Efficiency Programs Non-Participant Panel Survey (Residential Retrofit Evaluation Group). In some cases, the wording of the questions or response categories has changed slightly. The symbol preceding the question number denotes from which survey it is pulled: * indicates the Shelton Group and ** indicates the Residential Retrofit Evaluation Group.*

Fielding and Sample Plan: Through coordination with the Massachusetts Residential Retrofit and Low Income (MA RR&LI) Evaluation Team, our team obtained 2010 PA customer lists from which we will draw the sample for this effort. All efforts will be made to remove any contacts that may have been reached through the MA RR&LI Evaluation's recent telephone surveys. We plan to complete 400 surveys with quotas reflective of customer distribution across PAs in the state. Because the 2012 Umbrella Marketing Campaign is set to launch March 1, 2012, our team intends to complete fielding of the survey before this date.

Introduction

Hello, this is _____ from Opinion Dynamics calling on behalf of a statewide research initiative.¹⁸ This is not a sales call.

[IF NAME IS AVAILABLE] May I please speak with <NAME>?

[IF NO NAME IS AVAILABLE OR IF NEEDED] May I please speak with someone who is involved in making decisions regarding improvements in your home? (If needed: Improvements such as replacing heating equipment or purchasing appliances.)

We're conducting a survey to gather information about advertisements you and other residents in the state are exposed to. (IF NEEDED: The survey should take approximately 10 minutes.)

[ROTATE SECTION 1 (E1 – E5) AND SECTION 2 (MR1 – MR8)]

SECTION 1

Exposure to Information Sources

¹⁸ We have removed references to the utilities and CLC in the introduction in order to avoid biasing responses to the initial questions about Mass Save. We do not want respondents to be thinking about energy or energy efficiency as they begin the survey. However, we will change the introduction to refer to the utilities and energy efficiency service providers if our response rate is low.

- E1. What organizations are you aware of that are in the market place promoting energy efficiency? **[MULTIPLE RESPONSE; UP TO 3]**
01. (Mass Save)
 02. (Utility companies or Energy Efficiency Service Providers – ex. Cape Light Compact)
 03. (Government officials/representatives)
 04. (Family, friends, or colleagues)
 05. (Contractors)
 06. (Retailers – ex. Home Depot, Sears)
 07. (Manufacturers – ex. lighting companies)
 00. (Other: **SPECIFY**)
 98. (Don't know)
 99. (Refused)
- E2. If you wanted to know more about energy saving opportunities, where would you look for information? **[MULTIPLE RESPONSE; UP TO 3]**
01. (Mass Save website)
 02. (Utility/Energy Efficiency Service Provider website)
 03. (Government website)
 04. (Family, friends, or colleagues)
 05. (Contractor)
 06. (Call utility/Energy Efficiency Service Provider 800 number)
 07. (Internet Search/Online (i.e., Google, Yahoo))
 08. (Manufacturer Websites)
 09. (Retailers/Stores)
 00. (Other: **SPECIFY**)
 98. (Don't know)
 99. (Refused)
- E3. What websites, if any, would you visit to find information on energy saving tips or practices? **[MULTIPLE RESPONSE, ALLOW UP TO 4 RESPONSES]**
1. (Utility / Energy Efficiency Service Provider Website)
 2. (Mass Save website)
 3. (Energy Star website)
 4. (Internet Search Engine (i.e., Google, Yahoo))
 00. (Other: specify)
 96. (None)
 98. (Don't know/Refused)
- E4. What telephone numbers, if any, would you call to find information on energy saving tips or practices? **[MULTIPLE RESPONSE, ALLOW UP TO 3 RESPONSES]**
01. (Utility/energy efficiency service provider 800#)
 02. (Mass Save 800#)
 00. (Other: specify)
 96. (None)
 98. (Don't know/Refused)
- E5. How would you prefer to receive information about specific programs to help you save energy in your home? **[MULTIPLE RESPONSE, UP TO 3] [INTERVIEWER NOTE ORDER OF REPORTING]**
01. (Television)
 02. (Newspaper or magazine)
 03. (Radio)

04. (Online ads)
05. (Online groups)
06. (Utility or energy efficiency service provider website)
07. (Utility or energy efficiency service provider representative)
08. (Contractor)
09. (Events or conferences)
10. (Direct mail)
11. (Email)
12. (Included with utility bill)
00. (Other: specify)
96. (I don't want any information about programs.)
98. (Don't know)
99. (Refused)

SECTION 2

Awareness of Mass Save

[SKIP MR1 IF E1=01, E2=01, E3=02, E4=02]

- **MR1. Have you seen or heard the term, "Mass Save"?
1. Yes
 2. No
 8. (Don't know)
 9. (Refused)

[Create mass save variable=1 if MR1=1, E1=01, E2=01, E3=02, E4=02]

[IF MASS_SAVE=0, SKIP TO NEXT SECTION]

- *MR1a. How familiar are you with Mass Save? Would you say...
1. Very unfamiliar,
 2. Somewhat unfamiliar,
 3. Neither familiar nor unfamiliar,
 4. Somewhat familiar, or
 5. Very familiar?
 8. (Don't know)
 9. (Refused)

MR2. What do you associate with Mass Save? [MULTIPLE RESPONSE; UP TO 4]

01. (Energy assessment or audit)
02. (Resource for energy information)
03. (Rebates/incentives for lighting)
04. (Rebates/incentives for appliances)
05. (Rebates/incentives for heating or cooling equipment)
06. (Rebates/incentives for insulation)
07. (Website)
08. (Utility companies)
09. (State government)
00. (Other: **SPECIFY**)
98. (Don't know)
99. (Refused)

MR5. Do you associate Mass Save with energy? (If needed: This includes electricity, natural gas, oil

or propane)

1. Yes
2. No
8. (Don't know)
9. (Refused)

MR3. Which of the following do you MOST associate with Mass Save? [ROTATE]

1. An audit program¹⁹
2. Rebates for a variety of equipment
3. A campaign for change
4. A resource for energy efficiency information and programs
8. (Don't know)
9. (Refused)

MR4. Please name any organizations that you think sponsor Mass Save. A best guess is fine.

00. [OPEN END]
98. (Don't know)
99. (Refused)

[IF E2=1 OR E3=2, SKIP MR6]

**MR6. Did you know there is a website called MassSave.com?

1. Yes
2. No
8. (Don't know)
9. (Refused)

[IF MR6=2, 8 OR 9, SKIP MR7]

**MR7. In the past six months, how many times have you visited the MassSave.com website?

1. None
2. Once
3. 2-5 times
4. 6-10
5. 11 or more
8. (Don't know)
9. (Refused)

MR8. How interested would you be in a single website that provides information on all of the energy efficiency programs and resources in Massachusetts that are available to you? Would you say you would be...?

1. Very interested
2. Somewhat interested
3. Neither interested or disinterested
4. Somewhat disinterested
5. Not at all interested
8. (Don't know)
9. (Refused)

¹⁹ We will analyze results based on whether people associate Mass Save with the residential audit program or not.

SECTION 3

Exposure to Mass Save Messaging (Aided)

[IF MASS_SAVE=0, SKIP TO A1]

**MS1. We're interested in all of the places where you may have heard about Mass Save. Have you ever... [1=YES, 2=NO, 8=DK, 9=REF] [ROTATE] [IF YES, IN THE PAST 6 MONTHS OR BEFORE THAT?]

- a. Seen a Mass Save billboard?
- b. Heard about Mass Save on the radio?
- c. Seen a newspaper article about Mass Save?
- d. Seen online advertising for Mass Save?
- e. Visited or seen a Mass Save booth at a public event, game or festival?
- f. Seen information about Mass Save in your utility bill?
- g. Seen an advertisement for Mass Save on public transportation (e.g. MBTA train)?
- h. Seen a newspaper or magazine advertisement for Mass Save?
- i. Received something about Mass Save in the mail?
- j. Received an email about Mass Save?

**MS2. Where else have you seen or heard about Mass Save?

00. [OPEN END]
96. (Nowhere else)
98. (Don't know)
99. (Refused)

Actions Based on Mass Save Messaging

A1. Are you aware of any of the following? [ROTATE CHOICES; 1=Yes, 2=No, 8=DK/REF] Are you aware that...

- A. Rebates and incentives from your utility or energy service provider for energy efficient appliances or for making home improvements are available?
- B. Energy Assessments of your home to find ways to save energy are available?
- C. Your electric or gas energy service provider's website has information about saving energy?
- D. Tax credits are available for making energy saving improvements to your home?

A2. Have you seen or heard of COOL SMART?

1. Yes
2. No
8. (Don't know)
9. (Refused)

A3. How about GasNetworks?

1. Yes
2. No
8. (Don't know)
9. (Refused)

A4. Have you ever participated in an energy saving program sponsored by your utility or energy service provider such as a rebate or incentive program? This might include rebates for upgrading lighting and appliances or for participating in a home energy assessment.

1. Yes
2. No
8. (Don't know)
9. (Refused)

(ASK IF A4=1)

- A5. Have you participated in a program within the past year?
1. Yes
 2. No
 8. (Don't know)
 9. (Refused)

[GEN VAR <PART>: IF A5=1, <PART>=1; ELSE <PART>=0]

[IF <PART>=0, SKIP]

- A6. What program(s) did you participate in? [ACCEPT MULTIPLE RESPONSES; INTERVIEWER NOTE ORDER OF REPORTING]
01. (Home Energy Assessment/Audit)
 02. (Appliance Incentives)
 03. (Appliance Recycling)
 04. (Heating Incentives)
 05. (Air Conditioning Incentives)
 06. (Insulation Incentives)
 00. (Other: SPECIFY)
 98. (Don't know)
 99. (Refused)

[ASK IF <PART>=1 AND MASS_SAV=1, ELSE SKIP TO F1]

- A7. Had you decided to participate in a Mass Save program BEFORE or AFTER you saw Mass Save advertisements?
1. (Before)
 2. (After)
 8. (Don't know)
 9. (Refused)

CAMPAIGN FAVORABILITY

[ASK ALL]

- F1. I appreciate your feedback. Mass Save is in fact 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, rebates and incentives for upgrading your heating or cooling systems to systems that use less energy, and incentives or assistance weatherizing or improving the energy performance of your home. Home audits and home energy assessments are one of the many programs that Mass Save covers.
- a. Were you aware of this before this call?
1. Yes
 2. No
 8. (Don't know)
 9. (Refused)

- b. Based on this general description, do you have a very favorable, somewhat favorable, somewhat unfavorable opinion, or a very unfavorable opinion of Mass Save?
1. (Very favorable)
 2. (Somewhat favorable)
 3. (Somewhat unfavorable)
 4. (Very unfavorable)
 8. (Don't know)
 9. (Refused)

[SKIP IF F1b=8, 9]

- F2. Specifically, why do you feel that way?
00. [OPEN END]
 98. (Don't know)
 99. (Refused)

Demographics

- *S1. Do you or does anyone in your household work for a gas or electric company, energy efficiency service provider, advertising agency or a market research firm?
1. Yes
 2. No
 8. (Don't know)
 9. (Refused)

[IF S1=1, THANK AND TERMINATE]

- **D1. Do you own or rent your home?
01. Own
 02. Rent
 00. (Other: specify)
 98. (Don't know)
 99. (Refused)

- **D2. In what year were you born? [NUMERIC OPEN END; 1890-1994]
9998. (Refused)

- **D3. Which of the following best represents your annual household income from all sources in 2011, before taxes? Was it..?
1. Under \$30,000
 2. \$30,000 to under \$60,000
 3. \$60,000 to under \$100,000 or
 4. \$100,000 or more
 8. (Don't know)
 9. (Refused)

- **D4. What is the highest level of education you have completed?
01. Less than high school
 02. High school graduate or equivalent (e.g., GED)
 03. Attended some college (includes junior/community college)
 04. Bachelors degree
 05. Advanced degree

- 00. (Other: Specify)
- 98. (Don't know)
- 99. (Refused)

*D5 What county do you currently live in? (DO NOT READ)

- 01. (Barnstable)
- 02. (Berkshire)
- 03. (Bristol)
- 04. (Dukes)
- 05. (Essex)
- 06. (Franklin)
- 07. (Hampden)
- 08. (Hampshire)
- 09. (Middlesex)
- 10. (Nantucket)
- 11. (Norfolk)
- 12. (Plymouth)
- 13. (Suffolk)
- 14. (Worcester) (Pronounced Wuh-ster)
- 00. (Other: SPECIFY)
- 98. (Don't know)
- 99. (Refused)

*D6. Which utilities or energy efficiency service providers currently provide your home's electric and/or gas services? **[MULTIPLE RESPONSE; UP TO 2]** (READ IF NECESSARY)

- 01. Columbia Gas (Formerly, Bay State Gas)
- 02. Berkshire Gas
- 03. Cape Light Compact
- 04. National Grid
- 05. New England Gas
- 06. NSTAR
- 07. Unitil (Pronounced, You-nih-til)
- 08. WMECO (Pronounced, Weh-mee-ko) (Western Massachusetts Electric)
- 96. (None of the above)
- 98. (Don't know)
- 99. (Refused)

[ASK IF D6=96, 98, OR 99, ELSE SKIP D7]

*D7. What is your zip code?

- 00. **[OPEN END]**
- 98. (Don't know)
- 99. (Refused)

**D8. [RECORD GENDER; DO NOT ASK]

1. Male
2. Female

Those are all of the questions I have for you today. Thank you on behalf of the statewide sponsors of Mass Save.

Massachusetts Umbrella Marketing Evaluation

C&I Customer Survey Instrument

February 17, 2012

Reviewer Note: This survey will be administered to Commercial and Industrial (C&I) customers in Massachusetts. The goal of the survey is to gain sector specific insight into customer awareness of Mass Save, exposure to and perceptions of Mass Save marketing efforts, information-seeking behavior, and information about past program participation.

Fielding and Sample Plan: We will complete interviews with a simple random sample of 315 C&I customers. We plan to draw the sample from 2010 PA customer lists.

INTRODUCTION

Hello, my name is _____ and I'm calling from Opinion Dynamics on behalf of a statewide research initiative.²⁰ May I please speak with the person responsible for making decisions about improvements for your business' facility? (IF NECESSARY: I am looking to speak with someone who might be involved in any decisions to improve or replace the systems in your facility, such as lighting or air conditioning.)

This is not a sales call. We are conducting a survey to gather information about advertisements you and other businesses in the state are exposed to. My questions should take a little more than five minutes and your responses will be kept anonymous.

AWARENESS OF MASS SAVE CAMPAIGN

MR1. Have you seen or heard the term, "Mass Save"?

1. Yes
2. No
8. (Don't know)
9. (Refused)

[IF MR1<>1 SKIP TO PA2]

MR1a. How familiar are you with Mass Save? Would you say you are...?

1. Very unfamiliar,
2. Somewhat unfamiliar,
3. Neither familiar nor unfamiliar,
4. Somewhat familiar, or
5. Very familiar?
8. (Don't know)
9. (Refused)

²⁰ We have removed references to the utilities and CLC in the introduction in order to avoid biasing responses to the initial questions about Mass Save. We do not want respondents to be thinking about energy or energy efficiency as they begin the survey. However, we will change the introduction to refer to the utilities and energy efficiency service providers if our response rate is low.

MR2. What do you associate with Mass Save? **[MULTIPLE RESPONSE; UP TO 5]**

01. (Energy assessment or audit)
02. (Resource for energy information)
03. (Rebates/incentives for lighting or lighting controls)
04. (Rebates/incentives for motors and VSDs)
05. (Rebates/incentives for HVAC equipment)
06. (Rebates/incentives for compressed air projects)
07. (Rebates/incentives for Custom projects)
08. (Website)
09. (Technical assistance/advice)
10. (Utility companies or energy efficiency service provider)
11. (State government)
00. (Other) **[SPECIFY]**
98. (Don't know)
99. (Refused)

MR3. To the best of your knowledge, does Mass Save offer solutions for your business, your home or both?

01. (My business ONLY)
02. (My home ONLY)
03. (Both)
98. (Don't know)
99. (Refused)

MR4. Which of the following do you MOST associate with Mass Save? **[ROTATE]**

1. An audit program²¹
2. Rebates for a variety of equipment
3. A campaign for change
4. A website

MR5. Please name any organizations that you think sponsor Mass Save. A best guess is fine. **[OPEN END]**

01. (Utility company or energy efficiency service provider-- ex, NSTAR or National Grid)
02. (State government)
00. (Specify)
98. (Don't know)
99. (Refused)

MR6. Do you associate Mass Save with energy? (If needed: This includes electricity, natural gas, oil or propane)

1. Yes
2. No
8. (Don't know)
9. (Refused)

²¹ We will analyze results based on whether people associate Mass Save with the residential audit program or not.

- MR7. If you wanted to know more about energy saving opportunities for your business, where would you look for information? (MULTIPLE RESPONSE, UP TO 5)
1. (Utility or energy efficiency service provider in general)
 2. (Utility or energy efficiency service provider website)
 3. (Utility or energy efficiency service provider 800 number)
 4. (Mass Save website)
 5. (Search engine such as Google or Yahoo)
 6. (Friends, family, coworkers)
 7. (Contractor)
 8. (Architect/Engineer)
 00. (Other, specify: _____)
 96. (I wouldn't look up any information.)
 98. (Don't know)
 99. (Refused)

- MR8. How would you prefer to receive information about specific programs to help you save energy at your business? [MULTIPLE RESPONSE, UP TO 3] **[INTERVIEWER NOTE ORDER OF REPORTING]**
01. (Television)
 02. (Newspaper or magazine)
 03. (Radio)
 04. (Online ads)
 05. (Online groups)
 06. (Utility or energy efficiency service provider website)
 07. (Utility or energy efficiency service provider representative)
 08. (Contractor)
 09. (Events or conferences)
 10. (Direct mail)
 11. (Email)
 12. (Included with utility bill)
 00. (Other, specify: _____)
 96. (I don't want any information about programs.)
 98. (Don't know)
 99. (Refused)

- MR9. Did you know there is a website called MassSave.com?
1. Yes
 2. No
 8. (Don't know)
 9. (Refused)

[IF MR9<>1, SKIP MR10]

- MR10. In the past six months, how many times have you visited the MassSave.com website?
1. None
 2. Once
 3. 2-5 times
 4. 6-10
 5. 11 or more
 8. (Don't know)

9. (Refused)

MR11. How interested would you be in a single website that provides information on all of the energy efficiency programs and resources available to your business in Massachusetts? Would you say you are...?

1. Very interested
2. Somewhat interested
3. Neither interested or disinterested
4. Somewhat disinterested
5. Not at all interested
8. (Don't know)
9. (Refused)

EXPOSURE TO MASS SAVE MESSAGING (AIDED)

- MS1. Mass Save is reaching out to businesses. We're interested in all of the places where you may have heard about how to save energy at your business. Have you ever... [1= Yes, 2 = No, 8 = DK, 9 = REF] [ROTATE A-H] [IF YES, IN THE PAST 6 MONTHS OR BEFORE THAT?]
- a. Seen a newspaper article about Mass Save?
 - b. Seen online advertising for Mass Save in the form of a web banner? (If needed: A web banner is an advertisement that runs along the border of a webpage and typically contains a link)
 - c. Seen a case study about a business that has saved energy through Mass Save?
 - d. Seen information about Mass Save in your company's utility bill?
 - e. Seen a newspaper or magazine advertisement about Mass Save
 - f. Heard about Mass Save on the Radio?
 - g. Visited or seen a Mass Save booth at a public event, game or festival?
 - h. Received something in the mail about Mass Save?
 - i. Seen or heard about Mass Save somewhere else?

[ASK MS2 IF MS1 = 1]

- MS2. Where else have you seen or heard business specific Mass Save information?
00. [OPEN END]
 96. (Nowhere else)
 98. (Don't know)
 99. (Refused)

PROGRAM AWARENESS AND PARTICIPATION

- PA2. Have you seen or heard of GasNetworks?
1. Yes
 2. No
 8. (Don't know)
 9. (Refused)

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.

1. Yes
2. No
8. (Don't know)
9. (Refused)

[ASK IF PA3 = 1, ELSE SKIP TO FV1A]

[ASK IF ANY MS1A-H=1, ELSE SKIP TO PA5]

PA4. Did you hear about these programs through the Mass Save advertisements you heard or saw?

1. Yes
2. No
8. (Don't know)
9. (Refused)

PA5. Has your business participated in any of these programs?

1. Yes
2. No
8. (Don't know)
9. (Refused)

[ASK IF PA5 = 1, ELSE SKIP TO FV1A]

PA6. What program did your company participate in? (MULTIPLE RESPONSE, UP TO 5)

01. (Incentives for energy efficient HVAC)
02. (Incentives for energy efficient lighting)
03. (Incentives for energy efficient motors)
04. (Incentives for variable speed drives/VSDs)
05. (Incentives for refrigeration equipment)
06. (Incentives for renewable energy)
07. (Energy audits or assessments)
08. (Technical assistance)
00. (Other, specify: _____)
98. (Don't know)
99. (Refused)

PROGRAM FAVORABILITY

[ASK ALL]

FV1a. I appreciate your feedback. Mass Save is in fact 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. Were you aware of this before this call?

1. Yes

2. No
8. (Don't know)
9. (Refused)

FV1b. Based on this general description, do you have a very favorable, somewhat favorable, somewhat unfavorable opinion, or a very unfavorable opinion of Mass Save?

1. Very favorable
2. Somewhat favorable
3. Somewhat unfavorable
4. Very unfavorable
8. (Don't know)
9. (Refused)

[SKIP IF F1b=8, 9]

FV2. Specifically, why do you feel that way?

00. [OPEN END]
98. (Don't know)
99. (Refused)

FIRMOGRAPHICS

We're almost finished. I have a few final questions about your facility.

F1. What type of business do you operate? (READ LIST IF NEEDED)

01. (Data Center)
02. (Laboratory)
03. (School or university)
04. (Health care or hospital)
05. (Hotel or motel)
06. (Industrial or manufacturing)
07. (Property management agency)
08. (Restaurant or food service)
09. (Warehouse, wholesaler, or storage)
10. (Grocery store)
00. (Other) **[SPECIFY]**
98. (Don't know)
99. (Refused)

F2. Does your company have natural gas?

1. Yes
2. No
8. (Don't know)
9. (Refused)

F3. As you may know, a utility account manager is a representative from your energy provider who provides assistance to large businesses to help them manage their energy use. Does your company have a utility account manager?

1. Yes
2. No
3. (Self or other person at this business)

8. (Don't know)
 9. (Refused)
- F4. Which of the following best describes the OWNERSHIP of this facility? My company...
1. Owns and occupies this facility
 2. Owns this facility but it is rented to someone else
 3. Rents this facility
 8. (Don't know)
 9. (Refused)
- F5. How many employees, full plus part time, are employed at this facility? (READ LIST IF NEEDED)
1. 1-10
 2. 11-25
 3. 26-50
 4. 51-100
 5. 101-500
 6. More than 500
 8. (Don't know)
 9. (Refused)
- F6. What is the approximate square footage of your facility? (IF NEEDED: For the facility where you are now. Your best guess is fine.) **[NUMERIC OPEN END, 9999998 DK 9999999 REF]**
- F7. Which of the following categories best describes your company's revenue in 2011?
1. Less than \$100,000
 2. \$100,000 to less than \$500,000
 3. \$500,000 to less than \$1 million
 4. \$1 million to less than \$5 million
 5. \$5 million to less than \$10 million
 6. \$10 million to less than \$20 million
 7. More than \$20 million
 8. (Don't know)
 9. (Refused)

CLOSING. Those are the last of my questions. On behalf of the Massachusetts statewide sponsors of Mass Save, thank you very much for your time and help with this study!

Appendix B. TOPLINE SURVEY RESULTS

Provided under a separate cover.

Appendix C. C&I CUSTOMER SIZE CLASSIFICATION

In determining the sample approach for the quantitative survey with commercial customers, the team, PA representatives, and Energy Efficiency Advisory Council (EEAC) Consultants discussed the possibility of drawing a stratified sample based on customer size. However, the data files available to the evaluation team only contained a customer size variable based on customer demand, and this value was not present for a significant number of customers.²²

As a result, the team chose to ask a series of questions to determine the size of survey respondents. Key areas of inquiry included whether a customer had a Utility Account Representative or not, and the business' total number of employees. In coordination with the Non-Residential Large Business Evaluation Team, we decided to use a combination of Account Representative and employee data to classify businesses. We employed the following methods:

1. **Account Representative Based:** All customers who self-report having an Account Representative are considered large. Those who do not report having one or do not know are considered small.
2. **Employee Based:** We used ranges to categorize respondents based on their number of employees. We define small businesses as having between 1-10 employees, medium as having between 11 and 50 employees, and large as having over 51 employees.

After classifying customers into size categories, the team also compared the demand-based size classifications present for some customers in the original sample file with the classifications resulting from the survey data. However, the number of completed interviews with customers outside of the small demand-based size category was insufficient to conduct a post-survey analysis of the relationship between demand-based classifications and survey-based size variables.

Below, we present the total number of completed interviews by customer size based on both survey-based approaches described above. Regardless of the method used, we completed the majority of PA interviews with small business customers.

²² As part of the prior Non-Residential Small Business Evaluation, an algorithm was developed to estimate monthly average peak demand for customers without demand meters and no monthly demand in their customer records. kW monthly average peak demand was estimated by extrapolating from demand data for those customers with demand meters and data in the customer records. Estimates were developed for about 70 percent of electric customers.

Table 4-13. Percentage of Completed Interviews by Customer Size

Customer Size	Account Representative Based		Employee Based	
	#	%	#	%
Small	263	84%	189	60%
Medium	--	--	74	24%
Large	51	16%	33	11%
Don't Know	--*	--	18	6%
Total	314	100%	314	100%

*Note: Those respondents who did not know whether they had an Account Representative are assumed to be small.

Further, we found no statistically significant differences in responses between the large and small size groups on key variables of interest. As a result, throughout the report we only present findings for C&I customers overall.

Appendix D. INTERIM MEMOS



MEMORANDUM

TO: Massachusetts Program Administrators and EEAC Consultants
FROM: Opinion Dynamics Evaluation Team
DATE: January 27, 2012
RE: Preliminary Focus Group Findings

The following memo provides high level findings from the residential focus groups conducted in Springfield and Boston on January 24th and 25th. This document is intended to provide a brief snapshot of the group discussions to inform modifications to the draft Residential General Population Survey.

Key Findings

Awareness of Mass Save differed across the geographic areas selected for the focus groups. The majority of customers in the Springfield groups was aware of Mass Save and spoke about it without prompting or probing. In contrast, the customers participating in the Boston groups demonstrated lower levels of Mass Save awareness. In addition, overall, customers demonstrated strong support for the concept of Mass Save as a partnership between utilities and state government, and felt that the coordination among these parties helped lend credibility to Mass Save.

The following sections provide additional bulleted findings related to each of the research questions associated with this evaluation activity.

Mass Save Meaning and Perceptions

- **What does Mass Save mean to customers? Is it a specific program or broad campaign? Is it connected with their PA(s)?**
 - Almost all focus group participants had heard or seen the term Mass Save in the past, although their level of knowledge about Mass Save varied dramatically.
 - Overall, focus group participants associated Mass Save with a particular program or programs designed to help them save energy in their homes. They mentioned the in-home energy audit program most frequently when talking about Mass Save, and most also believed that Mass Save serves everyone.
 - Customers in the Springfield groups demonstrated greater levels of awareness regarding Mass Save and spoke about it without prompting. In general, they

associated the effort with the in-home energy audit program offered by the utilities. Whether they had participated in an audit or not, perceptions of the in-home energy audit program were positive and therefore this group generally had a positive perception of Mass Save.

- Customers in the Boston groups did not mention Mass Save when discussing how they hear about ways to save energy in their home, or when asked where they would go for additional information on this topic. When prompted to think about what comes to mind when they hear Mass Save, the majority suspected the program was offered by the government.
- Recognition of the Mass Save logo was generally limited. The majority of customers thought it looked somewhat familiar, but didn't feel that they had seen it regularly and couldn't recall where they had seen it if they had.
- Respondents most frequently cited a connection to their utilities and state government when explaining what they thought Mass Save was. However, all of the groups expressed confusion and curiosity about who was behind the effort when it was first discussed.
- Customers also generally preferred to see either all of the utility logos presented with Mass Save or none of them. Those who had a positive perception of their utility said they did not mind seeing only that logo along with Mass Save, but the presence of all the utility logos made people feel positive about the partnership and Mass Save.

Clarity/Confusion around Messaging

- **What is the main point/information that people are getting from Mass Save marketing? What do they think it's telling them (information or suggested actions)?**
 - Across all of the focus groups, customers generally felt that the Mass Save advertising was trying to get them to participate in an energy efficiency program and to some degree direct them to information about how to save energy.
 - As highlighted above, customers felt that Mass Save was intended to serve all customers, although a few expressed concern that the program might not reach renters.
 - In addition, there was almost universal agreement that program specific advertising and messaging was more actionable than general outreach through the Mass Savers campaign for example.
 - In all groups and particularly those in Boston, customers were confused as to what Mass Save was when looking at some of the advertisements presented. Those advertisements that contained a description of Mass Save, as well as logos from all of the sponsors helped to address these questions.
 - In all of the groups, customers expressed some skepticism about advertisements that try and sell them something. This skepticism further fueled interest in knowing specifically who is behind the advertisements and what those entities have to gain from these offers.

- **Do customers feel like they hear many different messages about how to save energy or a few? Are they conflicting messages or coherent?**
 - The customers with whom we spoke generally feel that information in the marketplace about how to save energy in their homes is clear and easy to understand.
 - While there may be multiple sources of information, none of the participants felt that there was confusion about the steps they should take to save energy.
 - As expressed in one group, there is consistency in the messages in the marketplace as “all of the offers say they will save you money.”

Need for Information

- **What information do customers need?**
 - Customers consistently noted the need for information about the entities providing programs and responded positively to advertisements that included a description of Mass Save.
 - Participants also demonstrated a need for information about programs, as well as where to look for more general information about how to save energy. In particular, they wanted to know where they could get information about incentives for purchasing efficient products, and one individual mentioned interest in receiving statistics about her energy use and carbon footprint.
 - In terms of program specific marketing, there was tension between advertising featuring specific measures versus advertising for a whole home solution like the Home Energy Services (HES) Program. When discussing a measure specific ad, one participant noted that “it would have to be something I needed at the time” in reference to whether the advertisement would get him to participate.
 - Customers appreciated the inclusion of contact information (e.g., 800-number or website) on the advertisements for Mass Save and were frustrated when they did not know how to follow-up or when they did not understand who was behind the advertising they saw.
- **Is the messaging appropriate?**
 - In general, customers in all of the groups preferred the messaging contained in 2011 advertising.
 - Across all four groups, the HES advertising presented from the 2011 campaign elicited the most positive response. People felt it was easy to understand and provided information upon which they could take action.
- **What suggestions do customers have for Mass Save? What strategy should be used going forward?**
 - Customers did not reach consensus on the best way for Mass Save to reach people. However, friends and family, energy bills, in-store information and information available online were the most frequently mentioned as preferred communication channels.
 - Customers in one Boston group had strong preferences for receiving information in their energy bill or on postcard-like mailings from the utility.

Reach of Messaging

- **What messages and media outlets most resonate with people? How well is the local media working in terms of disseminating information?**
 - We consistently heard that customers hear about how to save energy from their utilities. In addition, customers mentioned local news media, home improvement stores, and local contractors as other entities or locations where they see information about energy efficiency.
 - In terms of messaging, we heard in all of the groups that the key to getting a customer to “pick-up the phone” and contact the program or Mass Save is to use the terms “free” and “no commitment” in promoting programs.

Effectiveness of Messaging

We are in the process of tabulating and reviewing written responses to survey questions administered during the sessions.



MEMORANDUM

TO: Massachusetts Program Administrators

FROM: Opinion Dynamics

DATE: February 2, 2012

RE: Interim Findings from Small and Medium C&I Customer In-Depth Interviews

This memo provides the interim findings from Opinion Dynamics' in-depth interviews of small and medium commercial and industrial (C&I) customers. We conducted these interviews as part of our evaluation of the Massachusetts Umbrella Marketing campaign for the Massachusetts Program Administrators (PAs). At this time, interviews with these customers are nearly complete. In addition, Opinion Dynamics plans to conduct a quantitative survey with C&I customers to expand on the findings we present here.

As of February 2, Opinion Dynamics conducted 23 interviews with small and medium C&I customers in Massachusetts. The team used a random sampling approach using data from PA customer lists. We also set quotas based on business size (small or medium) and geography (Eastern or Western Massachusetts). Table 1 shows the number of completed interviews in each of these four groups.

Table 1. Sample Design and Completed Interviews by Group to Date

Business Size	Small Businesses		Medium Businesses	
Location	Eastern MA	Western MA	Eastern MA	Western MA
Interview Goal (Min)	8	8	5	5
Interview Completed to date	8	8	3	4
Remaining Interviews	0	0	2	1

In addition to the quotas described above, the team is monitoring the number of completed interviews to ensure we reach gas customers as well as electric customers. To date, we have reached 14 customers with gas service.

Key Findings

Energy Efficiency Knowledge and Attitudes

Customers generally had positive attitudes toward energy efficiency – all said that saving energy was “very” important to their organizations – but they varied in how much action they had taken to save. Two businesses said that they had taken on load-shifting, and nearly all said that they had practices at their business to save energy, such as turning out the lights. Six said they had done larger retrofit

efforts, and one said that they had begun a renewable installation project at their business. Two customers also said that they were interested, but had not yet taken actions because they did not know what applied to their business. One of these customers mentioned that their business has only been in operation for about six months, while the other said that they only knew of residential programs.

Our interviews also explored areas where customers may have demonstrated interest in energy efficiency, such as policies on energy use and participation in other energy efficiency programs. Customers varied in terms of the policies they had regarding energy use at their businesses. Furthermore, the presence of official policies on energy usage did not necessarily indicate a greater concern about energy efficiency at the business compared with customers who did not have an official policy. Two customers said that they have clear policies guiding their energy usage. One of these customers, a hotel owner, described specific policies that affect their housekeeping practices:

“We do (have a policy on energy use) but I couldn’t state them off the top of my head. I mean we essentially instruct our housekeepers (for our hotel) to shut off all of the – once they are cleaning rooms to shut off the HVAC heating and cooling systems, turn off lights, turn down – you know make sure that rooms that are not occupied don’t have anything running.”

Three customers, who were property managers, said that they did have policies in place but they were not enforcing strict limits on their tenants. The remaining customers said that they did not have official policies in place, though some noted that they do unofficially monitor their energy use and take some conservation practices. However, as one customer describes, these practices can be very similar to those described by customers who do have official policies in place.

“Not really, nothing in writing whereas to where we – we just take it upon ourselves and try to save as much as we can and make sure everything’s turned out that can be turned out before we go home.”

Participation in non-PA energy efficiency programs was low, but still had some influence on business’ actions. Two customers mentioned the LEED certification program as a major influence on their energy efficiency actions. One said that LEED played a strong role in their contractor’s practices, which in turn improved their energy efficiency:

“All the new developments that they (our contractor) are building are LEED gold certified. They are really ahead of the curve.”

Our interviews also asked customers about the key considerations in equipment purchases at their businesses. Cost was a top factor for most businesses in their decision-making – only one said that it was a factor but not top factor. Other customers cited return on investment and other long-term cost factors, as well as energy efficiency, ease/efficiency of operation, quality of equipment, savings on energy bills, aesthetics, and presence of tax incentives as key considerations.

“Well first would be the functionality of the machinery or equipment or whatever we were buying and then I’d also be looking to make our energy usage a lot more efficient than it is.”

“I’ve always been of the opinion that cost isn’t the number one – it’s more of how the equipment is built, how substantial it is, what’s the overall life of the equipment? And the overall you know cost of

operating the equipment.”

Perception of Mass Save Marketing Efforts

Customers had low to moderate awareness of energy efficiency advertising, though some said that they only recalled residential marketing efforts.

“It doesn’t target businesses; it seems to target either residential or commercial. The program that we’ve gotten involved in is kind of special projects program and it doesn’t seem to really make an effort of targeting industry. We’ve saved quite a bit of energy you know and it just seems to target households.”

“Most of the things I’ve seen are from the electric company relating to personal you know residences, more targeted towards the residence.”

Awareness of the Mass Save campaign in particular was low to moderate. Three customers were not familiar the term “Mass Save” at all, while only one customer could name and describe the initiative unaided. Several customers said that the name was familiar, but only two could describe any marketing efforts in detail. Most customers were able to describe Mass Save only in vague terms, and could not describe any specific messaging or where they had seen it:

“I’m sure I have (seen Mass Save ads), but I can’t remember where.”

“Was that the tax program; something related to rebates, tax credits or not necessarily tax credits, but maybe cash rebates?”

Further, only two customers recalled seeing and were able to describe the Mass Save logo.

None of the customers said that they were familiar with the Mass Save slogan, but all respondents who were read the slogan said that they understood it and that it fit well with their understanding of the value of energy efficiency. One said:

“I mean it’s pretty simple, the lower the usage the lower the cost and therefore you save over time.”

Because customers had low awareness of Mass Save, they did not indicate any conscious changes that they made or actions that they took due to seeing the Mass Save advertising. Some customers also did not believe that they had any outside influences for energy efficiency actions that they had taken. One said:

“It hasn’t really been, you know any of the energy efficiency things that we’ve done have really been self grown.”

One barrier for Mass Save in terms of reaching and motivating customers is that some customers are not responsible for paying their utility bills, and therefore unlikely to be motivated in terms of bill savings. This also means that they would never see advertising included in their utility bills. Two respondents said that a third party pays their utility bills.

Customers varied in the marketing types that they found most effective: two said that mail outreach was effective, while five called out mailings as highly ineffective. Customers most often mentioned learning about energy efficiency through word of mouth and personal contact, with people both

within and outside of their companies.

“This industry is a lot of word of mouth, a lot of initiatives and programs and decisions that we make in regards to anything you know comes from what has worked for other individuals, other properties, other management groups, and that’s probably the most valuable resource.”

“I think so [that I’m getting enough information about ways to save energy]. I mean I’ve got a fellow that is after me now for solar issues; he wants to put solar panels on.”

“My son owns a lighting business. ... Well he had done a couple of our plants – our facilities for us so he gave me some pointers on what to look for and what to order and things like that.”

Customers also mentioned that they look online for information about ways to save energy and energy efficiency programs, although only a few mentioned that they would think of their energy provider’s website as a resource on their own. However, a few also expressed interest in the Mass Save website and information after it was mentioned and described to them.

Participation in Mass Save Programs

Program awareness was higher than awareness of Mass Save advertising, but was still low to moderate. Customers who performed retrofits were the most likely to be aware of the PA programs: Of the six customers who had conducted retrofits at their facilities, four said that they had participated in a Massachusetts PA program.

However, most customers did not connect the Mass Save campaign to their energy providers – in fact, some respondents were aware of both the Mass Save campaign and PA programs, but they did not indicate that they understood the two were related.

“You know honestly I’m now beginning to wonder, I could be just not knowing it, again like I had someone from NSTAR come out last week, some of their incentives that they’re offering may have been through Mass Save I just didn’t know.”

One respondent said that they had participated in programs with their utilities, but they had also complained that they had contacted Mass Save and not gotten any response. This indicates that this respondent likely did not think of Mass Save as connected to the utility program that they were already participating in, as they did not describe their contact with Mass Save as related to their contact with the utility.

The main reasons that customers would want to participate in these PA programs was to reduce costs, and two mentioned specifically reducing the payback period as the main motivator. One respondent mentioned that not all programs were a fit for their needs, however:

“It depends on each individual project. You know if we have a project that would be a five-year payback and the incentives make it a three-year then it’s a large – you know, a large impact. ... But if it doesn’t really change the payback significantly then you know it’s great that they’re willing to chip in but it’s not going to do a lot for us.”

However, the Mass Save campaign was not cited as an influence in customer decisions to participate in PA programs – the utility programs themselves played a greater role.

Preliminary Conclusions

Based on the findings presented above, we offer the following preliminary conclusions. Note that we will revise and update this section of the memo based on additional in-depth interviews.

Considerations for Survey Design

- **The survey should not include overly detailed questions on Mass Save messaging.** Customer awareness of the Mass Save was low. Most customers were able to recall Mass Save only after prompting from the interviewer, and even those customers could not describe the advertising in much detail. Respondents in a quantitative survey are unlikely to be able to answer detailed questions about their unaided recall of Mass Save advertising.

Considerations for Programs

- **Customers are receptive to messaging about energy efficiency, and are sometimes, but not always, seeking out information on their own.** All customers interviewed said that they considered energy usage important, and most said that it was “very” important. However, less than half of customers said that they had completed any retrofit projects, although a few more mentioned that they had projects under way. Very few customers were already aware of Mass Save, though several were interested in learning more about it after hearing about it in the interview. Furthermore, several customers said that they did not have enough information about energy efficiency, indicating that they would like to receive more. As a result, the campaign should seek to strengthen the connection between Mass Save and businesses in the state.
- **Mass Save materials should emphasize the connection to PA programs.** The respondents interviewed generally understand the value of energy efficiency, and those who are doing upgrades are usually contacting PA programs about them. However, no respondent said that they participated in a program because of seeing the Mass Save materials, and several indicated that they did not know that the PA programs and the Mass Save materials were connected. Interviewed customers indicated that they have trust for their energy providers, as one described:

“I think that honestly I think the best way that I’ve experienced is when you work with local utility companies, you know when they can bring it to you and sometimes I won’t—you know I won’t reach out to them, they’ll reach out to me and say hey we have some incentive programs, we want to come out and see if you qualify. Then it’s a no brainer for us.”

Furthermore, because several customers are also aware of PA programs, emphasizing the connection between Mass Save and PA programs should help customers understand the benefits of Mass Save clearly.

Appendix E. 2010 INTERIM REPORT

Provided under a separate cover.