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Cool SmartSM and GasNetworks[®] Brand Assessment

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1. Executive Summary

This report presents findings from an integrated assessment of statewide energy efficiency brands in Massachusetts. The Opinion Dynamics team conducted an assessment of contractor awareness and perceptions around two HVAC contractor-targeted brands – Cool SmartSM and GasNetworks[®] – and the state’s umbrella brand, Mass Save, which generally targets residential and commercial customers. To complement prior Mass Save studies which focused on end-use customers, this study aims to explore the relationships between the three brands and characterize their roles within the HVAC supply-side market. The study also has the goal of determining whether the presence of three co-existing brands contributes to any market confusion.

In particular, the specific research objectives for this study include the following:

- Provide documentation of the brand strategy and branding efforts undertaken to date for the Cool Smart and GasNetworks brands
- Explore brand awareness, knowledge, and associations between Mass Save, GasNetworks, and Cool Smart
- Assess branding effectiveness for each brand
- Examine the relationship between awareness and attitudes toward Mass Save, GasNetworks, and Cool Smart

Research Activities

To support the assessment of Cool Smart and GasNetworks, Opinion Dynamics reviewed all of the statewide marketing materials used in 2013, as well as each of the PA websites. We also fielded telephone surveys with a sample of Massachusetts HVAC contractors, and asked them about program awareness, associations, favorability, and participation. In addition, we conducted a literature review exploring the benefits and drawbacks of having similar coexisting brands in a specific market.

Key Findings

Opinion Dynamics provides the following key findings from the study:

- **Neither Cool Smart nor GasNetworks has a formal brand strategy.** However, the programs have been successful in educating contractors about what they offer, and therefore building the mental associations and expectations that constitute a brand.¹
- Marketing and outreach for the Cool Smart program has both a target audience and a distinct set of core messages. In particular, Cool Smart marketing efforts are effective at conveying to contractors messages related to quality installation and differentiation in the market.
- GasNetworks has relied on a much broader set of marketing messages to engage its target audience. However, its program design emphasizes promoting rebates for energy-efficient

¹ While the term “brand” can have many definitions, it is generally considered “what your product or service stands for in people’s minds.” (Adamson, 2006).

equipment, as opposed to other benefits such as contractor training, which is emphasized by the Cool Smart program.

- **Awareness of Cool Smart and GasNetworks is moderate to high.** We found that among contractors who install eligible equipment (i.e., cooling equipment for Cool Smart and heating and hot water equipment for GasNetworks), 65% are aware of Cool Smart and 66% are aware of GasNetworks.
- **Awareness of Mass Save® is almost universal.** In comparison to Cool Smart and GasNetworks, 89% of all contractor respondents were aware of Mass Save. While there were different perceptions of what Mass Save offered, contractors are clearly seeing and hearing messages about the statewide campaign. They are also utilizing the website.
- **As expected, most contractors associate Cool Smart and GasNetworks with rebates for heating and cooling equipment.** When asked about what they associate with each program, program participants' unaided responses most commonly focused on rebates for heating and cooling equipment, and much less frequently on the other features. Fewer contractors readily associate the Cool Smart Program with its QIV certification and training offerings, which have been the focus of some program messaging.
- **Associations with Mass Save are varied.** Contractors associate Mass Save with a number of different PA program offerings, including rebates on heating and cooling equipment. Contractors are also much more likely to associate Mass Save with HEAT loans, rebates for insulation and lighting, and energy audits than they are with either Cool Smart or GasNetworks, which indicates some knowledge of the differences in the initiatives.
- **There is no definitive relationship between awareness and attitudes toward Mass Save, GasNetworks, and Cool Smart.** We looked for potential relationships between awareness and attitudes toward the various brands, but there were no clear correlations largely due to the very high levels of Mass Save awareness and favorability.
- **At present, there is no evidence to suggest that having coexisting brands is causing confusion in the market.** While each of the brands has key similarities, there also appears to be little risk of competition as contractors have high levels of awareness and relatively distinct associations with each brand. Given the moderate to high levels of awareness and favorability enjoyed by all three brands, the PAs could safely continue to leverage all three brands or integrate them under the Mass Save umbrella.

2. Introduction

This report presents findings from an integrated assessment of statewide energy efficiency brands in Massachusetts. The Opinion Dynamics team conducted an assessment of contractor awareness and perceptions around two HVAC contractor-targeted brands – Cool Smart® and GasNetworks® – and the state’s umbrella brand, Mass Save, which generally targets residential and commercial customers. The goal of this effort was to assess the programs’ messaging impact across key metrics such as awareness, exposure to and clarity of marketing messages, and attitudes and favorability toward these brands within the HVAC supply side market segment. The results presented in this report are based on quantitative telephone surveys fielded with Massachusetts HVAC contractors. In addition, we conducted interviews with key program managers, and a review of program marketing materials and websites. Finally, we conducted a literature review of research on the benefits and drawbacks of maintaining coexisting brands.

Overview of Programs

The Cool Smart and GasNetworks programs target HVAC contractors—and to a lesser degree, residential and commercial customers—with messaging aimed at increasing the installation of highly energy-efficient heating and cooling technology. Mass Save, the state’s umbrella brand covering a variety of energy efficiency programs, generally targets residential and commercial end-use customers.

Program messaging primarily relies on high-visibility channels to reach HVAC contractors, including messaging at supply houses, on websites, and in trade magazines and publications. Cool Smart’s messaging focuses on the benefits of installing high-efficiency cooling equipment for customers, as well as enabling contractors to stand out by being able to offer access to HEAT loans and quality installation practices through quality installation verification (QIV) certification and other training opportunities. GasNetworks offers a wider array of rebates on qualifying equipment, and relies on contractors to explain the benefits of these measures to customers. The program also holds an annual event where contractors can see the latest in high-efficiency gas heating and water heating technology, and learn more about program offerings.

Evaluation Approach

The evaluation team conducted qualitative and quantitative research as part of this study, as shown below in Table 1.

Table 1. Evaluation Activities

Evaluation Task	Completes	Description
In-Depth Interviews with Program Staff	6	Provides information on brand strategy, as well as marketing and outreach tactics.
Marketing Material Review	N/A	Provides background on program messaging, goals, and tactics
Literature Review	N/A	Provides information on the benefits and drawbacks of having similar coexisting brands in the market. Leverages the experience of other industries.
HVAC Contractor Survey	206	Provides information on awareness of and familiarity with Cool Smart, GasNetworks, and Mass Save; exposure to program marketing efforts; and program associations among participating and non-participating firms

3. Methodology

Opinion Dynamics conducted a series of in-depth interviews with staff at participating Massachusetts program administrators (PAs) and the Cool Smart program implementation contractor. We reviewed marketing materials, rebate forms and websites for both programs. We also conducted a literature review on the concept of brand confusion for similarly designed programs, and conducted a telephone interview with Massachusetts HVAC contractors designed to identify contractors' awareness and associations with both programs and Mass Save. We describe the methods used for each of these research activities in more detail below.

3.1 In-Depth Interviews and Marketing Material Review

To better understand Cool Smart and GasNetworks program messaging, we spoke with program representatives about branding strategy and implementation, their opinions on branding effectiveness, and their role in the planning and implementation processes. For Cool Smart, we spoke with two PAs and Conservation Services Group (CSG), the Cool Smart program implementer. GasNetworks is implemented directly by the PAs, so we spoke with three PA representatives actively involved with administering and implementing the program. These interviews lasted between 16 and 72 minutes, depending on the level of involvement the respondent had with the program.

The PAs and CSG provided us with lists of all marketing efforts, as well as accompanying documentation. These materials consisted of print media, supply house outreach activities and accompanying marketing materials, training and events documents and accompanying marketing materials, program websites, electronic newsletters, and e-blasts. We reviewed these materials for slogans, themes, and messaging.

3.2 Literature Review

The evaluation team performed a literature review of scholarly journals and available articles on branding. The purpose of our review was to identify strategies and lessons learned from other industries in the deployment of multiple coexisting brands. Thirteen (13) works were reviewed, from which we identified a number of benefits and drawbacks of having multiple coexisting energy efficiency brands in the state (Appendix A).

3.3 HVAC Contractor Survey

Opinion Dynamics conducted a telephone survey with a random sample of 206 contractors who provide heating and/or cooling equipment to Massachusetts customers. The survey explored exposure to and awareness of Cool Smart, GasNetworks, and Mass Save. The evaluation team fielded the survey from February 13 to March 7, 2014.

We developed the sample from multiple data files. Table 2 below shows the contractor survey sample design. We identified participating contractors using the GasNetworks and Cool Smart rebate databases, as well as the Cool Smart quality installation verification (QIV) training list. To identify non-participating contractors, we purchased a list of contractors from Dun & Bradstreet® (D&B). After the files were combined, we removed duplicates and firms with missing or bad contact information. The total number of interviews provides results at 90% confidence and 6% precision at the statewide level.

Table 2. Contractor Survey Sample Design

Contractors	Population	Sample Frame	Completed Interviews
Cool Smart Rebate Database Only	84	81	3
GasNetworks Rebate Database Only	1,641	1,588	61
Both Cool Smart and GasNetworks Rebate Databases	305	282	6
Cool Smart QIV Training Database	270	223	31
Non-Participant (Dun & Bradstreet)	4,531	4,306	105
Total	6,831	6,480	206

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

Table 3. Disposition of Targeted Contractors

Disposition	N
Completed Interviews (I)	206
Eligible Non-Interviews	3,946
<i>Refusals (R)</i>	1,772
<i>Telephone Answering Device (NC)</i>	1,756
<i>Mid-Interview Terminate (R)</i>	42
<i>Respondent Never Available (NC)</i>	360
<i>Language Problem (NC)</i>	16
Not Eligible (e)	866
<i>Fax/Data Line</i>	45
<i>Non-Working</i>	354
<i>Wrong Number</i>	209
<i>Residential/Government</i>	249
<i>No Eligible Respondent</i>	10
Unknown Eligibility Non-Interview (U)	1,462
<i>Not Dialed/Worked</i>	0
<i>No Answer</i>	763
<i>Busy</i>	125
<i>Call Blocking</i>	19
<i>Call Back Appointment</i>	555
Total Customers in Sample	6,480

Table 4 below provides the response and cooperation rates, which are typical for contractor-based surveys.

Table 4. Contractor Survey Response and Cooperation Rates

AAPOR Rate	Percentage
Response Rate (RR3)	3.67%
Cooperation Rate	10.11%

Weighting

We weighted the survey results to account for potential non-response bias. We found that we had a higher survey response rate among the contractors we obtained through the program participant databases than the D&B database. The sample frame could serve as a proxy for the target population of contractors, but some differences between the source of sample frame and survey responses made us uncomfortable with this approach. Using the sample frame, we categorized contractors by type of equipment and participation status. This categorization did not always match contractor self-reports in the survey. This difference caused us to calculate two sets of weights. The first set addressed these re-classification issues (adjustment weights), and the second addressed the difference in response rates across the categories of our original sample frame (response rate weights): cooling only, heating only, both heating and cooling, and non-participants.

To calculate adjustment weights, we took the approach of re-constructing the sample frame based on interview information. As such, if a contractor was categorized as a heating only contractor (and therefore eligible for the GasNetworks program), but we determined in the interview that they were actually a heating and cooling contractor, and was a participant in the Cool Smart program, the company was placed into these new categories. After completing all of the interviews from the heating-only list, we created a ratio of the number of contractors who were heating and cooling contractors and participants in the Cool Smart program divided by the total number of interviewed contractors from the heating-only list. By multiplying that ratio by the total number of contractors in the original list of heating-only contractors, we could estimate the number of (original) heating-only contractors that install both heating and cooling equipment and are participants in the Cool Smart program. This number could then be added to the number of contractors in the original list of cooling contractors. Similarly, when we made these calculations for the original cooling contractor list, we also had to remove some contractors from that list by using another ratio based upon that group’s results. By creating a set of appropriate ratios to apply to each category in the original sample frame, we were able to create a new sample frame that is likely close to what it would have been if we had interview-type information for all. After we constructed the adjusted sample frame, we created weights based on the actual interviewed sample for each compared to the new sample frame. Note that only one interview from the cooling-only list revealed a cooling-only contractor, and that was a non-participant. Therefore, we added all “cooling-only” contractors from the original list to the “both heating and cooling” list. Thus, there was no cooling-only category in the adjusted sample frame, or in the interviews.²

We created the response rate weights by taking the inverse ratio of the sample fraction based on the number of responses within each of the three lists from the original sample frame. From those results we calculated relative weights by dividing them by their mean. It should be noted that this could be thought of as a combination of (relative) expansion weights and response rate weights because all members of the sample frame were solicited for interviews. In other words, the “sample” was actually an attempted census.

² We also detected 11 contractors that were not HVAC or hot water equipment contractors. These were removed from the adjustment ratios.

The final weights were calculated by multiplying the adjustment weights by the response rate weights. They are shown in Table 5 below.

Table 5. Sampling Weights

Sample Category	Heating Only	Heating and Cooling	Non-Participants
Adjustment Weights	0.35	2.10	0.96
Response Weights	0.96	0.54	1.51
Final Weights	0.33	1.13	1.45

4. Study Findings

The following section of the report presents results from the Opinion Dynamics evaluation team’s review of program marketing materials, program staff in-depth interviews, and telephone contractor interviews with a focus on program awareness, messaging, associations, and favorability.

4.1 Overview of the Cool Smart and GasNetworks Brands

The Cool Smart and GasNetworks programs both aim to increase the energy efficiency of cooling and heating equipment by offering financial incentives and technical assistance to residential customers and HVAC contractors. Both programs have been offered by the Massachusetts program administrators (PAs) for more than 10 years, making them longstanding and well established offerings. In terms of marketing and outreach, both programs primarily target contractors based upon the program theory that contractors have considerable influence upon customers’ HVAC equipment purchases. They also benefit from coordination of marketing efforts, including advertisements in trade magazines for both brands, and each having a presence at the other’s conference.

While both programs encourage the installation of high-efficiency HVAC equipment, there are significant differences between the program structures. Cool Smart has an administration vendor, Conservation Services Group (CSG), while GasNetworks’ implementation is coordinated directly by the participating Massachusetts PAs. Additionally, while GasNetworks offers training on the installation of their equipment, Cool Smart has a stronger focus on quality installation practices that ensure additional energy savings. Cool Smart is offered to residential customers, while the GasNetworks program has both commercial and residential offerings.

Below we outline the ways in which program staff view these programs and their associated brands.

4.1.1 Cool Smart

Cool Smart is a residential central air conditioning (CAC) rebate program that promotes high-efficiency CAC systems and best installation practices through rebates to customers and contractors. The Cool Smart program has been offered since 2004, and is currently implemented by CSG and Parago Services Corporation on behalf of the Massachusetts PAs. As part of the program, residential customers installing qualifying CAC systems, such as traditional split systems, air source heat pumps, or mini-split systems with thermostatic expansion valve (TXV) or electronic expansion valve (EXV) are eligible for a rebate through the

program. Cool Smart offers a tiered rebate program where homeowners installing equipment with higher efficiencies receive larger rebates. Customers who have rebate eligible equipment installed by Cool Smart Quality Installation Verification (QIV) trained contractors may also be eligible for Mass Save's HEAT Loan program, which offers zero-interest loans for the purchase of high-efficiency HVAC equipment.

All licensed contractors are eligible to install qualifying equipment and receive equipment rebates. However, Cool Smart-trained contractors can receive incentives for program installations and are eligible for additional training and financial incentives. Financial incentives are available for QIV (up to \$375), the early replacement of qualifying units (\$850), duct sealing (\$2 per CFM, up to \$600), and downsizing of equipment (\$250 per half ton). Cool Smart-trained contractors can earn up to \$2,500 per job in financial incentives from the Cool Smart program.

In general, the program staff with whom we spoke do not view Cool Smart as a brand, but a long-standing energy efficiency program. As a result, program staff have not focused on creating a Cool Smart brand or building brand equity; rather, their marketing focuses on educating contractors about the benefits of participation in the program.³ As part of their efforts, they have co-branded with Mass Save, and Mass Save logos can be found in the program's print advertising and on the Cool Smart website. Cool Smart's micro-site is also located within masssave.com.

Brand Strategy

The Cool Smart program aims to reach both contractors and residential customers with its marketing efforts. However, the PAs report that the majority of Cool Smart marketing efforts are focused on contractors. As a result, this analysis focuses on contractor-targeted efforts.

While marketing to non-participating contractors is necessary for program expansion, CSG reports that the primary objective of the program's marketing efforts is to enroll a select group of contractors and provide those contractors with training to perform high-quality installations and retrofits. Keeping these contractors well informed about the program and actively involved is a high priority. The main method of keeping these contractors informed is through a list-serve. Aside from this tool, program marketing efforts are aimed at contractors that do not participate in the program, or who have submitted rebates but have not yet completed the QIV training.

Program administrators conduct outreach to participating and non-participating contractors, with a few key messages delivered through several channels. The majority of the marketing is aimed at encouraging contractor participation in the program. Overall, Cool Smart's contractor-targeted marketing highlights contractor training opportunities, available financial incentives, and the high quality work performed by Cool Smart contractors. The marketing also stresses that Cool Smart-trained contractors can differentiate themselves from their competition by offering HEAT loans, larger rebates to customers, and superior quality installations. Some examples of this messaging include:

- "Get the training you need and prepare for success"
- "Earn incentives for doing Quality Installation Verification testing"
- "Differentiate your business from the competition"

³ It is important to note that the program staff with whom the team spoke are relatively new to the programs. As such their views may not be reflective of past practices.

As outlined below, Cool Smart delivers branding messages through a variety of channels, including leveraging its relationship with supply houses, conducting trainings and events, advertising in industry journals, and maintaining its own website.

- **HVAC Supply Houses:** Cool Smart has identified the contractor-supply house relationship as a key avenue for marketing the program to contractors. This is the most consistent activity, happening throughout the year and requiring significant outreach. Cool Smart employs circuit riders who develop relationships with supply houses, make regular visits, and attend supply house-sponsored events such as trainings and luncheons. Circuit riders also provide up-to-date program guides, rebate forms, and Cool Smart posters, and coordinate Cool Smart trainings at supply houses. While at the supply houses, circuit riders can also serve as a resource for contractors.
- **Training:** The Cool Smart program offers QIV training courses aimed at increasing the participation of QIV-trained contractors. The program also offers trainings on topics such as “System Design 101” and “Duct Design, and Testing Sensible Gains.” Upon completion of select courses, contractors are eligible for additional incentives through the program, and their name is more prominently featured on the Cool Smart page of the Mass Save website.
- **Events:** In 2013, Cool Smart held its first annual HVAC training conference, where 150 industry professionals received training. The conference featured workshops followed by a reception and dinner. Participants also had access to vendors selling energy-efficient products. Cool Smart also cosponsors an annual golf event with Air Conditioning Contractors of America (ACCA), and staffs a booth at the GasNetworks annual conference.
- **Program Website:** Cool Smart maintains a microsite (<http://www.masssave.com/about-mass-save/programs/cool-smart>) within masssave.com that provides program information for both contractors and residential customers.
- **List-Serve:** Cool Smart uses a list-serve of participating contractors to promote and provide updates on the program, including changes in the program offerings and upcoming trainings and events. In addition, the invitation for the first annual HVAC training conference went to all of ACCA’s local membership and all contractors who have participated in the Cool Smart program.
- **Print Media:** Cool Smart advertises in industry journals, including *HVAC Insider* and *Progress Magazine* (co-sponsored with GasNetworks).

In general, this marketing strategy appears to convey a limited number of specific messages to the program’s targeted contractor audience.

4.1.2 GasNetworks

GasNetworks is a collaborative of local gas utilities in Massachusetts that provides rebates and incentives to customers who install high-efficiency heating and water heating equipment. GasNetworks also provides training and information to heating contractors on new gas technologies and on how to install high-efficiency equipment. In contrast to Cool Smart, GasNetworks only offers customer rebates, and does not offer contractor incentives. However, all licensed contractors are eligible to install qualifying equipment. In addition, GasNetworks offers contractor training, but does not offer additional incentives for contractors who complete this training.

The PAs involved in the implementation of GasNetworks do not view it as a brand, but simply as a longstanding energy efficiency program. In particular, the program has offered rebates to contractors for 15

years, and sees itself as a cornerstone of the gas heating contractor community in Massachusetts. As such, there has not been a focus on creating a brand identity, but rather on educating contractors about the benefits of program participation. In addition, it is important to note that GasNetworks is currently co-branded with Mass Save to a limited degree. In particular, the Mass Save logo is found on print advertising, but is not present on the GasNetworks website, nor is it consistently found on electronic advertising or all rebate forms for the program.

Brand Strategy

Based on the program theory that most customers rely on contractor recommendations when selecting equipment to install, the overwhelming majority of GasNetworks marketing and outreach efforts are designed to reach contractors.⁴ As a result, our analysis focuses on contractor-targeted marketing.

The GasNetworks program promotes energy-efficient heating technologies and rebates available to support their installation. Marketing also highlights training opportunities and the potential for increased sales by contractors because of participation in the program. In general, there is no consistent GasNetworks message, but phrases used as part of marketing efforts include:

- “The latest in natural-gas heating products and technology”
- “Competitive Edge”
- “Learn how to sell high-efficiency heating equipment”
- “Help your customers save energy and money”
- “Train with the experts”

GasNetworks also uses a variety of channels to disseminate messages about the program:

- **Annual GasNetworks Event:** PAs describe the annual GasNetworks event as a cornerstone of the GasNetworks program. The event offers contractors the opportunity to learn about the newest in energy efficiency technology, including installation practices. The PAs estimate that more than 400 contractors attended the 13th annual conference in 2013.
- **HVAC Supply Houses:** GasNetworks staff reported that circuit riders visited 229 supply houses in Massachusetts in 2013. Circuit riders develop relationships with supply houses, make regular visits, and attend supply house-sponsored events. Circuit riders provide supply houses with rebate forms and GasNetworks posters, and serve as a resource for contractors.
- **List-Serve:** GasNetworks maintains a list serve of approximately 1,000 contractors, energy auditors, policy makers, and other interested parties. Emails typically have an open rate in excess of 30%. They include information about programmatic changes and upcoming events, as well as general information on energy efficiency.
- **Program Website:** GasNetworks maintains an independent website (<http://www.gasnetworks.com>) that is not co-branded with Mass Save. The website address is featured prominently in marketing,

⁴ The exception is customer-targeted marketing that can be found near thermostats and water heaters in do-it-yourself (DIY) stores.

including rebate forms, pens, and notepads. The website provides contractors and customers rebate forms, as well as information about energy efficiency. Additional GasNetworks information can be found on the Mass Save website as well.

- **Collateral:** GasNetworks distributes branded material, such as pens and notepads, at supply houses and industry events.
- **Print Media:** GasNetworks advertises in industry journals, including *HVAC Insider* and *Progress Magazine* (co-sponsored with Cool Smart).
- **Additional Events:** GasNetworks has a presence at the Cool Smart annual conference.

Overall, our interviews with PA staff and review of GasNetworks marketing materials indicates that the program has a long history in the state, with varied messaging and outreach tactics targeted specifically to contractors installing eligible equipment.

4.2 Contractor Characteristics

We surveyed 206 Massachusetts-based HVAC contractors. Nearly every firm we spoke with reported that they install some kind of heating equipment, while slightly less than two-thirds of these firms install cooling equipment, as shown in Table 6 below. Therefore, the target audience for Cool Smart is smaller than the audience for GasNetworks. Further, contractors largely serve the residential and commercial HVAC markets; fewer than half of respondents said that they serve industrial clients.

Table 6. Contractor Equipment and Market Segment Focuses

Contractor Characteristics	Percentage (n=206)
Contractor Equipment	
Install Heating Equipment	94%
Install Water Heating Equipment	85%
Install Cooling Equipment	64%
Contractor Market Segment	
Serve Residential Customers	91%
Serve Commercial Customers	79%
Serve Industrial Customers	41%

In addition, both programs rely heavily on supply houses as a key marketing channel. We found that 95% of contractors get at least some of their equipment from supply houses, confirming that this is an effective channel for reaching the contractor population.

We completed surveys with respondents from firms of a variety of sizes and ages. The average firm responding had eight employees, though firm size ranged from one employee to 300. Firms ranged in age from only one year old to over a century, with the average firm having been in business for about 23 years.

Table 7. Responding Contractor Firmographics

Contractors (n=206)	Average	Minimum	Maximum
Number of Employees	8	1	300
Number of Heating or Water Heating Systems Installed	60	0	700
Number of Residential Air Conditioning Systems Installed	4	0	12
Number of Commercial or Industrial Projects	5	0	50
Company Age (in years)	23	1	110

4.3 Program Participation

Overall, those we spoke with had relatively high levels of engagement with the Cool Smart and GasNetworks programs. We asked contractors if they had done any of the following items. As shown in Table 8 below, 65% of respondents who install cooling equipment are aware of Cool Smart. Just under half (45%) of these respondents participated in the program by either filling out a customer rebate form or attending a program event or training. Additionally, nearly a third of Cool Smart participating firms (33%) have at least one employee who is QIV-certified.

Table 8. Cool Smart Participation Summary

Involvement with Cool Smart	Percentage (n=133)
Install cooling equipment	100%
Aware of Cool Smart	65%
Visited website	45%
Are a program participant	45%
Filled out rebate form for qualifying job	41%
Attended an event or training	34%
Firm employee is QIV-certified	33%

Almost all contractors interviewed install heating equipment, and among them 66% are aware of GasNetworks. As shown in Table 9 below, 51% of those contractors are program participants. Most are participants because they have filled out a program rebate form (50%). Fewer reported having attended a GasNetworks event or training (12%), though the annual GasNetworks event is usually well attended.

Table 9. GasNetworks Participation Summary

Involvement with Cool Smart	Percentage (n=197)
Install heating equipment	100%
Aware of GasNetworks	66%
Are a program participant	51%
Filled out rebate form for qualifying job	50%
Visited website	42%
Attended an event or training	12%

In addition, contractors that install cooling equipment report that, overall, a third of their projects (36%) on average include some sort of Cool Smart rebate. In comparison, among firms that install heating equipment, nearly half of their projects include a GasNetworks rebate (46%).

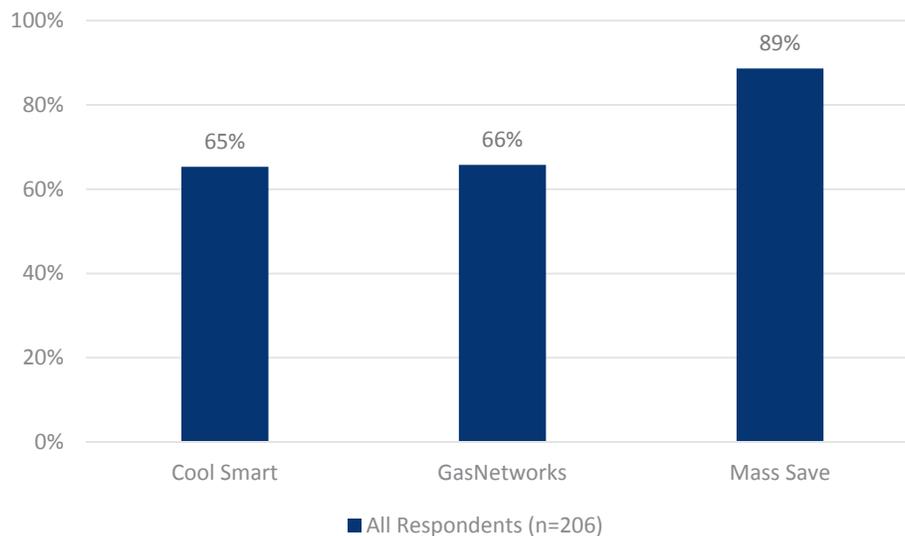
4.4 Program Awareness

Program awareness is 100% for both Cool Smart and GasNetworks participants, as would be expected. However, among program non-participants who install eligible equipment (i.e., cooling equipment for Cool Smart and heating and hot water equipment for GasNetworks), just 21% are aware of Cool Smart, and 33% are aware of GasNetworks.

As shown in Figure 1 below, awareness of Cool Smart, GasNetworks, and Mass Save is moderate to high among contractors, with Mass Save having the highest levels of recognition (89%). Among contractors participating in either Cool Smart or GasNetworks (n=128), awareness of Mass Save is 93%, while it is slightly lower (83%) among program non-participants (n=78).

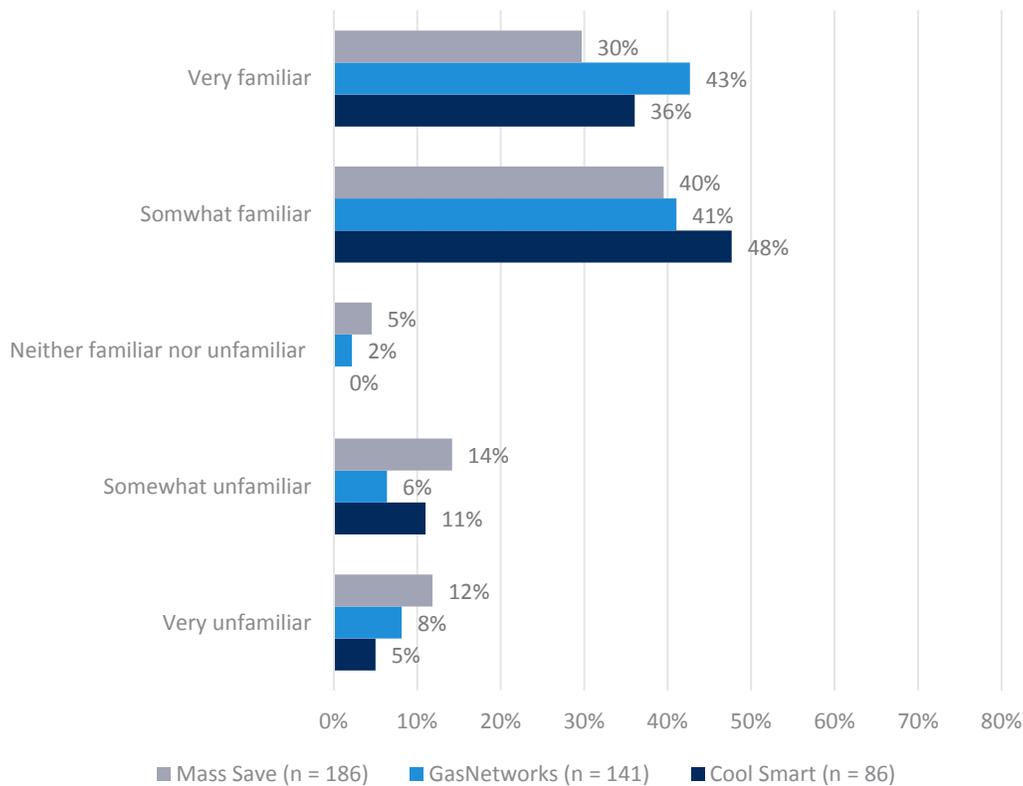
Awareness of Cool Smart among contractors who install cooling equipment (n=133) is 65%. The vast majority of contractors install some type of heating equipment (n=197), and awareness of GasNetworks is 66% among that group.

Figure 1. Awareness of Programs among Contractors Installing Eligible Equipment (Aided Name Only)



We asked contractors who were aware of these programs about their degree of familiarity with them. Overall, contractors who are aware of the programs report moderate to high levels of familiarity with the programs. As shown in Figure 2 below, among those who had seen or heard about Cool Smart, 36% said that they were “very familiar” with the program. Forty-three percent (43%) of contractors who said they had seen or heard about GasNetworks said that they were “very familiar” with that program. Comparatively, 30% of those surveyed said that they were “very familiar” with Mass Save, even though more people initially reported being aware of that program. This is likely due to the fact that while GasNetworks and Cool Smart are very specific to programs that contractors are likely to be familiar with, Mass Save is an umbrella brand that covers many PA initiatives.

Figure 2. Contractor Familiarity with All Programs among Those Aware (Aided)



We also asked if contractors were aware that there was a website called “masssave.com.” Eighty-one percent (81%) of contractors said that they knew about the website, and among those aware, 77% reported that their company had referred a customer to the site.

4.5 Associations

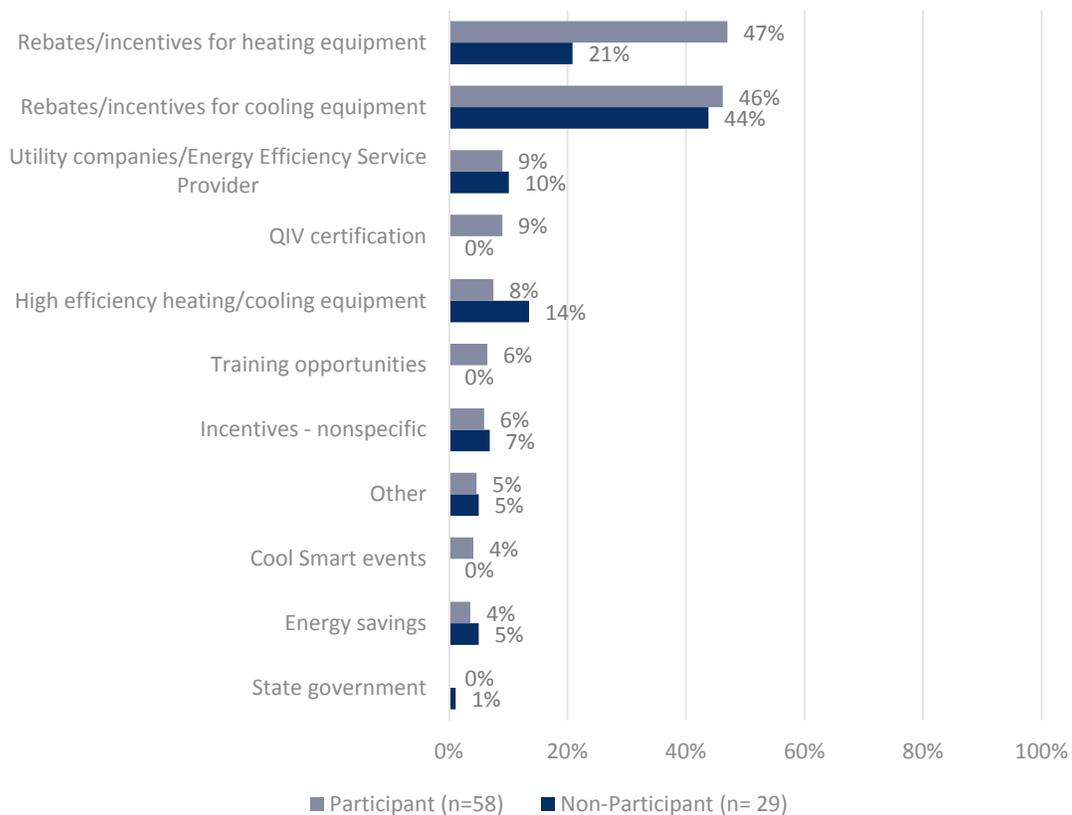
4.5.1 Program Associations

We asked contractors about what they associate with Cool Smart, GasNetworks, and Mass Save. We did this in both an unaided and aided manner. The unaided question asks contractors to describe, in their own words, what they associate with each program. The aided version asks about specific program features and messages being used to promote the programs.

Figure 3 below presents the unaided associations with Cool Smart for those contractors who were aware of Cool Smart and who install cooling equipment, broken out by program participants and non-participants. Among participants, respondents were nearly equally likely to mention rebates on heating equipment and rebates for cooling equipment, which were also the most frequently mentioned program association.

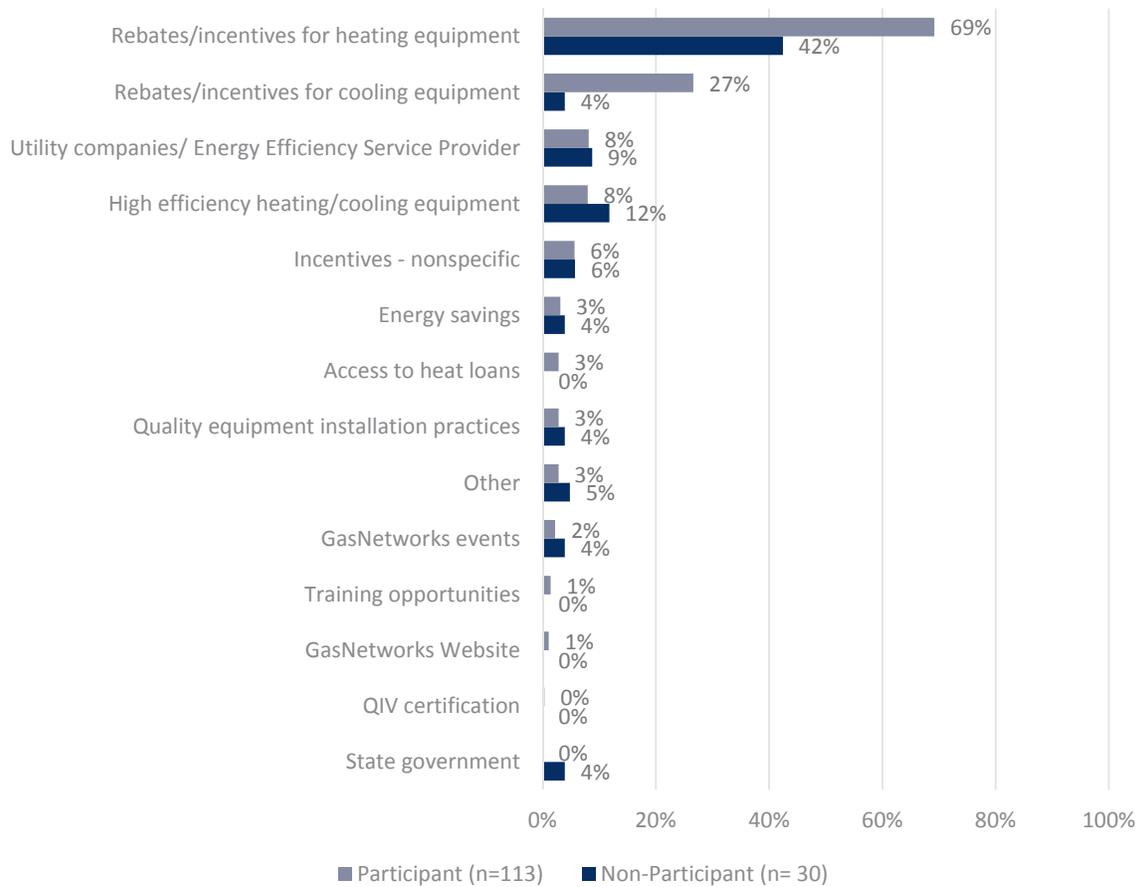
Conversely, program non-participants were more likely to associate cooling rebates with the program. This would indicate that program participants view the program as offering dual savings channels, because some of the measures rebated by the program (such as air source and mini-split heat pumps) have both heating and cooling functions. Further, mentions of Cool Smart’s QIV certification and training opportunities were limited to program participants only, suggesting that people who do not participate in the program don’t readily identify these features with it.

Figure 3. Unaided Contractor Associations with Cool Smart by Participation Level among Those Aware (Multiple Response)



Contractors aware of GasNetworks, and who install heating equipment, tend to associate the program primarily with rebates for heating equipment, as shown in Figure 4 below. However, participants were much more likely to mention the rebates for heating equipment than were non-participants. Participants were also much more likely to mention rebates for cooling equipment. Given that GasNetworks, like Cool Smart, offers rebates on dual-use equipment such as programmable thermostats, this would also indicate that participants are more aware of program offerings. Other program components were mentioned relatively infrequently and there was very little difference between participants and non-participants, indicating that the program’s reputation is squarely centered on its rebate offerings.

Figure 4. Unaided Contractor Associations with GasNetworks by Participation Level among Those Aware (Multiple Response)



We also asked participating⁵ and non-participating contractors about their associations with Mass Save. As seen in Figure 5 below, participants were more likely than non-participants to mention rebates for both heating and cooling equipment. They were also much more likely to associate Mass Save with HEAT loans than the other programs. These results suggest that Cool Smart and GasNetworks participants are more attuned to what Mass Save can offer them financially than non-participants are. Among the other responses, we found no substantial difference between participants and non-participants.

⁵ Participants in this case include any respondent who reported participating in either program.

Figure 5. Unaided Contractor Associations with Mass Save by Participation Level among Those Aware of Program (Multiple Response)

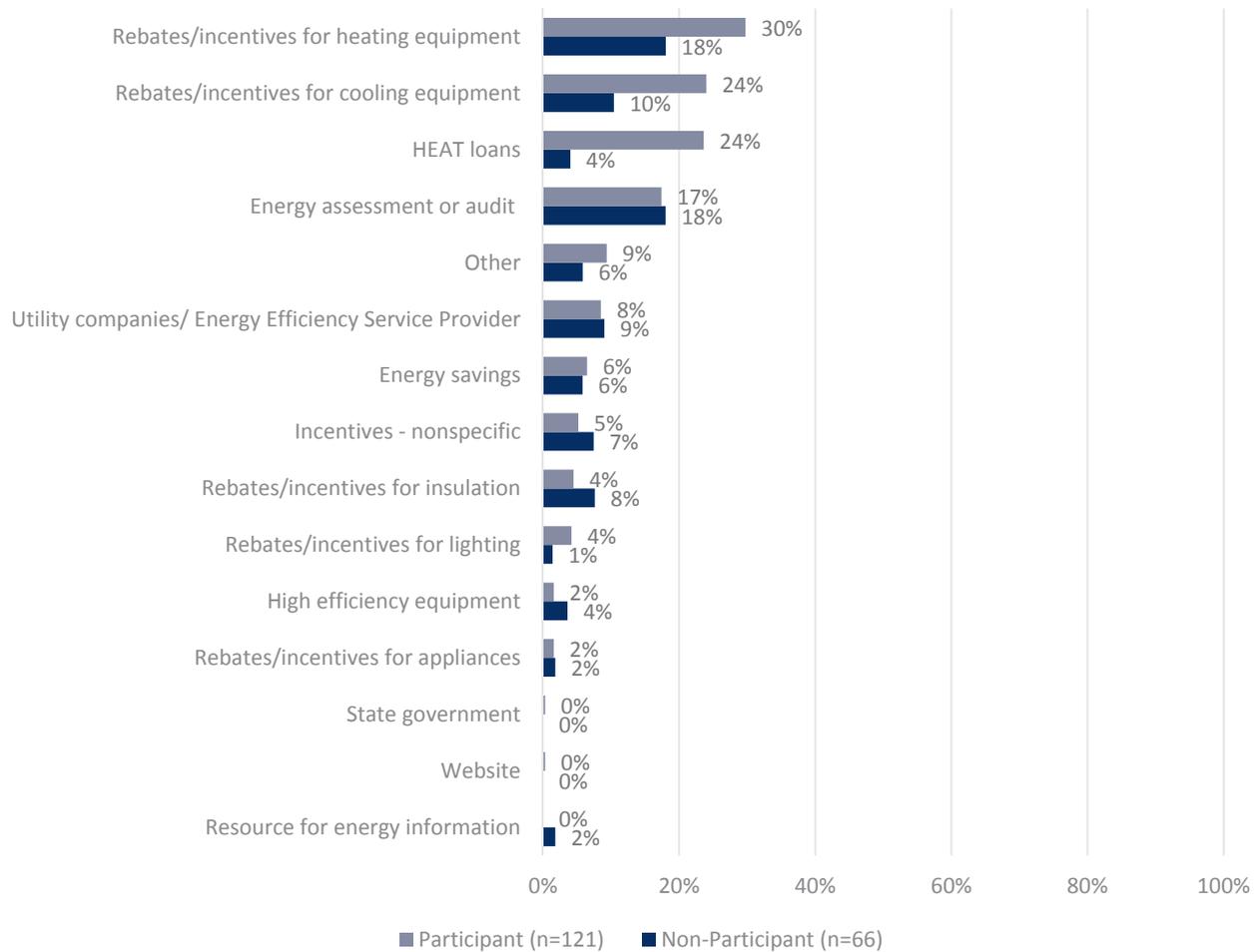


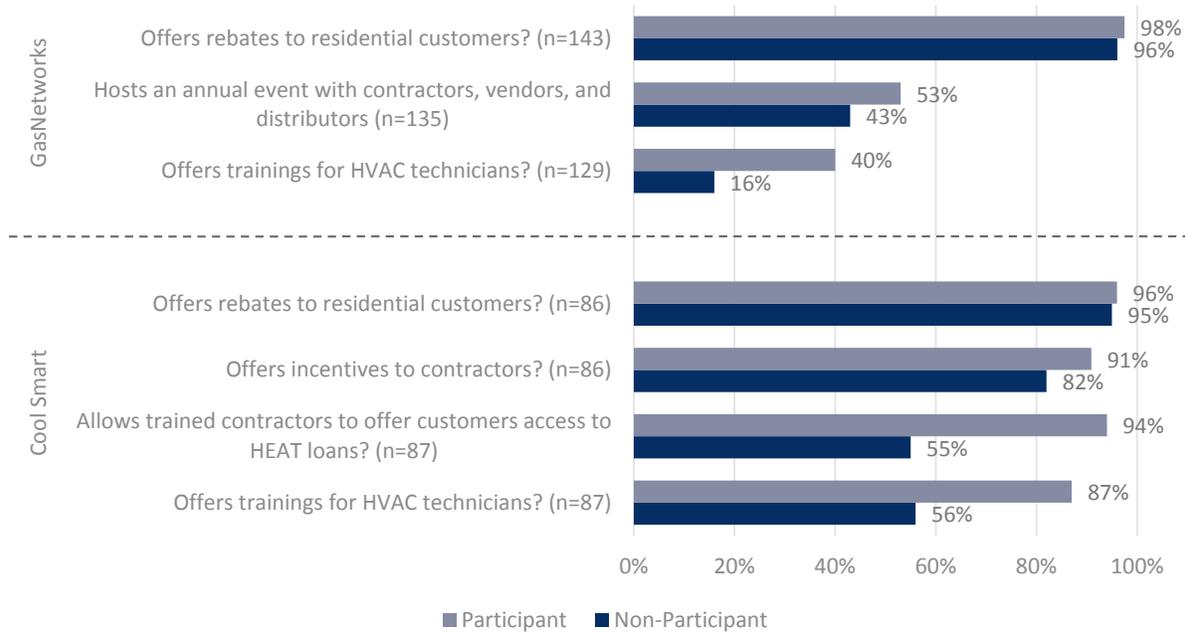
Figure 6 presents the aided associations with GasNetworks and Cool Smart. We asked contractors how strongly they agreed with a number of statements about key program components. We again found that contractors are knowledgeable about the fact that both of these programs have rebate components. Nearly every contractor agreed with the statement that Cool Smart and GasNetworks offer rebates to residential customers.

However, among Cool Smart participants, there was much stronger agreement that the program offered contractor rebates, access to HEAT loans, and training opportunities for HVAC technicians. Non-participants were much less likely to agree that Cool Smart offered these program components, especially HEAT loan access and trainings. This data would suggest that Cool Smart participants have a good understanding of the program’s various offerings. Increasing non-participant awareness of these options may induce greater program participation.

There are also differences in program knowledge between contractors that participate in the GasNetworks program and those that do not. Slightly more participants than non-participants agreed that the program

hosted an annual event for contractors, vendors, and distributors. Participants were also much more likely to say that GasNetworks offered trainings for HVAC technicians.

Figure 6. Aided Program Component Awareness by Participation Level



4.5.2 Exposure to Program Messaging

To better understand the effectiveness of the various channels used to market the programs, we asked contractors about all of the places they may have heard about Cool Smart and GasNetworks. As shown in Table 10 below, program or utility websites, posters at supply houses, , program emails and trade magazines are the most common channels where contractors had either seen or heard about the programs. However, substantially more contractors saw posters at supply houses with information on GasNetworks than saw the same with Cool Smart messaging (61% and 43%, respectively).

Table 10. Contractor Exposure to Messaging on Cool Smart and GasNetworks

Information Source	Cool Smart (n=133)	GasNetworks (n=197)
Program website	44%	46%
Poster at a supply house	43%	61%
Program email	43%	32%
Trade publication or magazine	42%	43%
Program representative	41%	28%
Program sponsored training or event	34%	12%
Newsletter	27%	30%
Supply houses/distributor	8%	10%
Internet	8%	4%
Other sources	6%	4%
Customers	5%	5%
Word of mouth (general)	4%	2%
Print ad (magazine, mail, etc.)	3%	3%
Trade show/event	3%	2%
Other contractors	2%	1%
Mass Save	0%	3%

Based on our conversations with program staff, the materials presented in supply houses are nearly always accompanied by a large supply of customer rebate forms. Customer rebate forms are also available on both the GasNetworks and Cool Smart websites. Given that contractors most strongly identify these programs with their rebate components, it is not surprising that contractors most frequently noticed these channels. Contractors that are aware of Cool Smart also report hearing about the program through program representatives and emails. These channels might be good choices to convey more information about Cool Smart’s training opportunities, as they lend themselves to more complex messaging.

Respondents were also asked how strongly they agreed or disagreed with several statements that could apply to the Cool Smart and GasNetworks programs. For example, we asked respondents how strongly they agreed or disagreed with the statement “Cool Smart/GasNetworks provides useful rebates and incentives which help my company make more sales.” These questions test whether contractors are aware of program offerings, and whether that awareness has an impact on program associations and attitudes toward them.

Respondents agreed that both programs provided useful rebates, though they more strongly associated GasNetworks with its rebate program. Nearly seven in 10 (69%) agreed that GasNetworks rebates were useful, and 56% said Cool Smart rebates were useful, as shown in Figure 7 below.

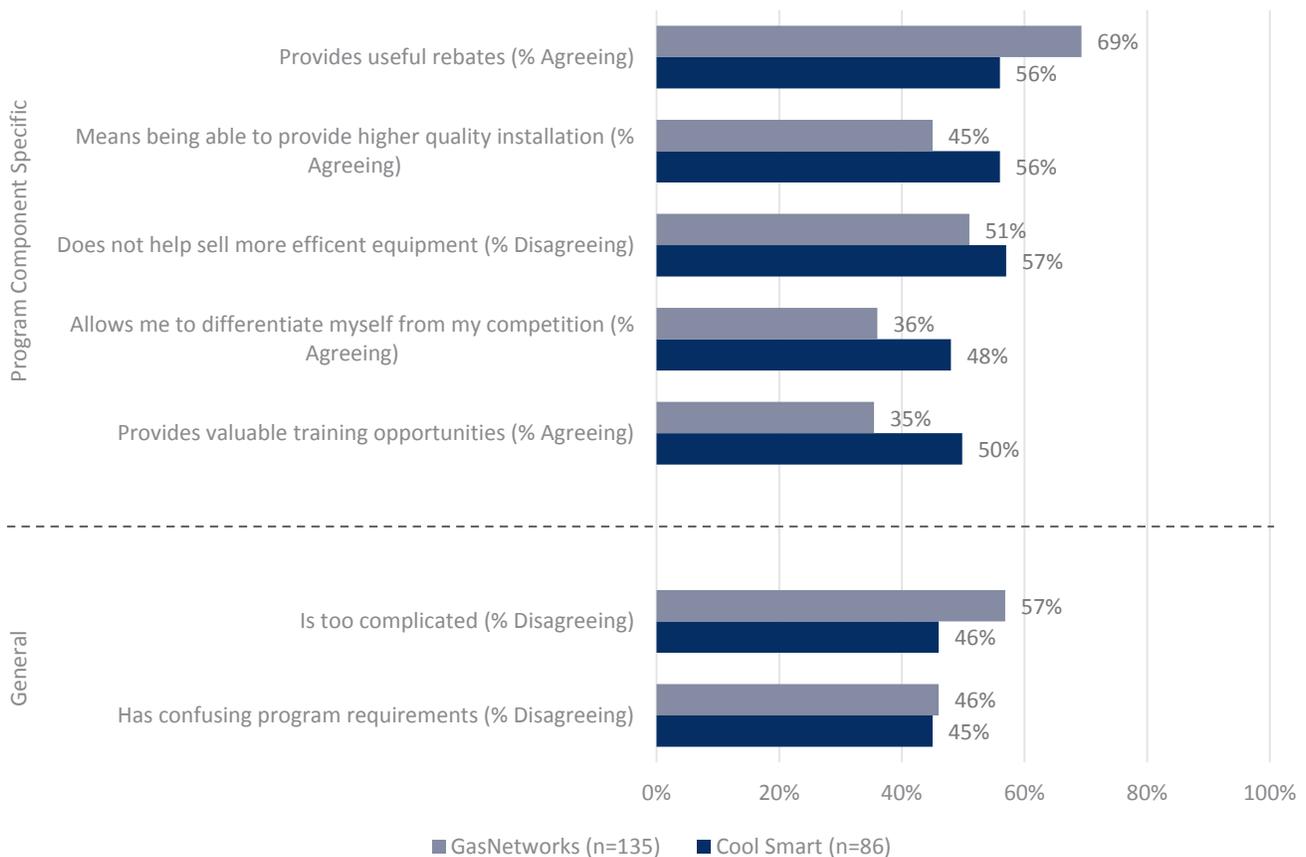
Fifty-six percent (56%) of contractors agreed that Cool Smart results in higher-quality installations, and 45% for GasNetworks. Higher-quality installations is a key message put forward by the Cool Smart program, so the high association with Cool Smart is expected.

Contractors associated the ability to help sell more-efficient equipment equally between the two programs. More than half of contractors disagreed with the statement that the programs “do not help my company sell more-energy-efficient equipment,” with the vast majority of those disagreeing with the statement doing so strongly.

Contractors generally felt that Cool Smart allows firms to stand out or differentiate themselves from their competition, and provides valuable training opportunities, which are both key Cool Smart program messages. Given Cool Smart’s emphasis in these areas, it appears that the contractors are associating these messages with the program. While fewer than half of contractors made these associations with the program, these program features are most likely to be valuable to the select group of contractors actively participating as Cool Smart contractors. When we limit responses to this question to firms that have contractors who are QIV certified (n=43), 64% agree that Cool Smart allows them to stand out, while only 16% disagree.

Finally, we also asked if respondents thought that either program had particularly confusing program components or was too complicated. More than half (57%) of contractors disagreed that GasNetworks was too complicated, and just under half (46%) disagreed with the idea that GasNetworks had confusing program requirements. Responses were similar for Cool Smart, but fewer than half (46%) disagreed that Cool Smart was too complicated.

Figure 7. Contractor Agreement on Program Components and Messages

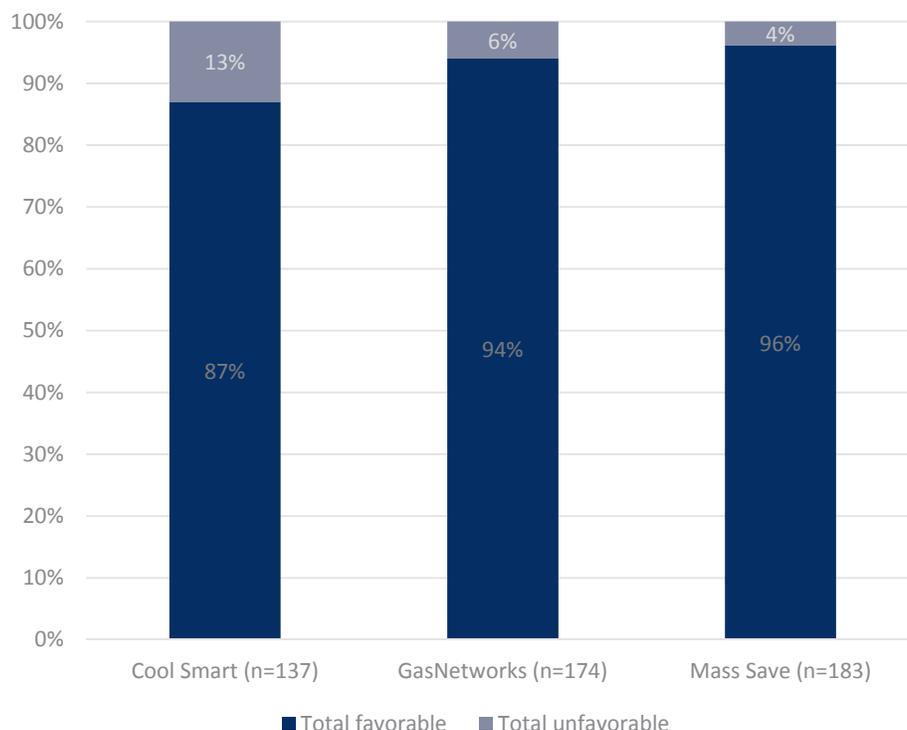


4.6 Program Favorability

To assess contractor attitudes toward all three programs included in the study, at the end of the survey participants were provided with a complete description of the Cool Smart, GasNetworks, and Mass Save programs. They were then asked if they were aware of these general descriptions of the programs before the call, and if they had a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable opinion of each program.

As shown in Figure 8 below, informed contractors have overwhelmingly favorable opinions of all three programs. Mass Save and GasNetworks, however, have slightly higher favorability than Cool Smart.

Figure 8. Contractor Favorability of Cool Smart, GasNetworks, and Mass Save



4.7 Other Contractor Information Sources

Cool Smart, GasNetworks, and Mass Save are not the only entities that contractors interact with on a regular basis. Contractors have a multitude of places to learn more about energy-efficient technologies, training opportunities, and cost-saving rebates. Therefore, we wanted to understand where else contractors go for information, and see the extent to which they consider these programs as key resources for various types of information. We asked contractors where they looked when searching for new information on efficient equipment, customer rebates, and training opportunities, and they identified the following:

- Most contractors said that they get information on new high-efficiency systems from their equipment suppliers (51%).

- In terms of information about training and professional development opportunities for their employees, the majority of contractors (53%) said that they turned to equipment suppliers for these types of opportunities.
- Very few contractors mentioned Cool Smart or GasNetworks as a source for information in these areas (less than 1% for equipment information and 2% for training).
- Nearly 15% of contractors mentioned either the Cool Smart or GasNetworks programs when asked where they go to get information on rebates and incentives for themselves and for their customers. Around 30% mentioned their equipment suppliers as a source of information on rebates and incentives. Twelve percent (12%) said that they looked online, and another 18% reported looking at the Mass Save program for rebates and incentives.

We asked contractors, “Besides Mass Save, GasNetworks, and Cool Smart, what other programs are you aware of that help companies like yours install high-efficiency equipment in customers’ homes or businesses?” Nearly two-thirds (66%) of participants said they could not think of any other sources. Among those that could, the most commonly mentioned entities were equipment manufacturers (8%), National Grid (4%), NSTAR (1%), the Massachusetts state government web portal (1%), and other utilities, including gas utilities (1%).

4.8 The Benefits and Drawbacks of Maintaining Coexisting Brands

This section of the report provides a summary of strategies and lessons learned from other industries in the deployment of multiple coexisting brands. The evaluation team gathered this information through a review of scholarly journals and available articles on branding.

4.8.1 Potential Benefits and Drawbacks to Similar Coexisting Brands

Multiple coexisting energy efficiency brands could allow the PAs to reach a wider variety of audiences and build on the reputation of each individual brand or program to create overarching associations as a group. Table 11 below highlights some of the key benefits of multiple coexisting brands, as documented in the literature.

Table 11. Potential Benefits to Deploying Similar Coexisting Brands

Benefits	Description
Ability to create distinct value propositions	Each brand can focus on distinct value propositions. By keeping their brands differentiated in the consumers' minds, the company avoids conflicting brand associations among their products. ⁶
Ability to target distinct audiences	By offering differentiated products with different value propositions, the company can also access a wider range of target markets or audiences for its product portfolio. ⁷
Brands can mutually reinforce their good reputations	Associated brands can lend their reputation to one another. For instance, the reputation of one brand can make the target audience more confident in the good quality of the other brand. This is especially useful in cases where the target audience knows much more about one brand versus the other. ⁸

In general, the key benefit in the Massachusetts context is the ability of the three brands to target distinct audiences. More specifically, Cool Smart and GasNetworks work to increase awareness and participation in PA programs among contractors while Mass Save focuses most of its marketing efforts on PA residential and commercial customers. Further, while Mass Save marketing efforts are not heavily geared towards contractors, their outreach to this group and the high levels of awareness mean that there is some potential for the third benefit associated with brand reputation.

As summarized in Table 12 below, some of the drawbacks associated with having multiple energy efficiency brands relate to the associations that customers may develop with the brands, and the extent to which the brands target the same customers.

⁶ David A. Aaker and Erich Joachimsthaler, "The Brand Relationship Spectrum: The Key to the Brand Architecture Challenge," *California Management Review* 42 (2000): 11.

⁷ Ibid.

⁸ Akshay R. Rao and Robert W. Ruekert, "Brand Alliances as Signals of Product Quality," *Sloan Management Review* (Fall 1994): 89.

Table 12. Drawbacks to Deploying Similar Coexisting Brands

Drawback	Description
Competing brands	In cases where multiple brands owned by one company operate in the same space, they may be at risk of competing with each other for customer attention and business. This issue is most acute when brands target similar sets of customers or offer their products through the same channels. ⁹
Damage or dilution due to brand similarity	When associated products are very similar, consumers are more likely to generalize their beliefs about one brand to their beliefs about other brands associated with it. ¹⁰ This creates the risk that having multiple brands can diminish or “wear out” the individual meaning of each brand (especially if the other brand name is well established). ¹¹ Further, should consumers develop negative associations (e.g., they believe it to be poor quality) about one brand in the mix, then consumer associations with the other brands may be adversely impacted. ¹²
The opportunity cost of alliances	Individual brands may have difficulty moving away from their former alliances. Referred to as the “cost of monogamy,” when companies form alliances around a product it may be difficult for them to “divorce” their relationship in both the short term (due to contractual obligations) or in the long term if customers develop strong associations between the two brands. ¹³

Given the high levels of awareness among HVAC contractors across all three brands included in this study, brand competition and dilution are potential challenges for deploying similar brands in the state. However, this does not appear to be a problem in Massachusetts as contractors currently make some distinct associations with each brand and have relatively high levels of favorability across all three brands.

4.8.2 Brand Strategy

Based on our review, the evaluation team also identified a number of brand strategies that companies use in their marketing and outreach efforts. In selecting a brand strategy, actors typically evaluate how the brands in their portfolio compare in terms of their value propositions and target markets. Another important consideration is the extent to which the reputation of one brand has the potential to benefit or damage the reputation of the other brand(s).

In Table 13 below, we summarize three common brand strategies to provide a framework for thinking about relationships between energy efficiency programs and brands in Massachusetts, as well as context around the potential benefits and drawbacks of having coexisting brands in the marketplace.

⁹ Julian Birkinshaw, “Strategies for Managing Internal Competition,” *California Management Review* 44 (2001): 30-32.
¹⁰ Barbara Loken and Deborah R. John, “Diluting Brand Beliefs: When Do Brand Extensions Have a Negative Impact?” *Journal of Marketing* 57 (1993):71.
¹¹ Ibid, 74.
¹² Eva Martinez and Jose M. Pina, “The negative impact of brand extensions on parent brand image,” *Journal of Product & Brand Management* 12 (2003): 447.
¹³ Rao and Ruekert, 93.

Table 13. Brand Strategy Framework

Brand Strategy	Overview	Examples	
House of Brands	An “independent set of standalone brands” that are managed by a “single master brand.” Specifically, the term “independent” means that the sub-brands do not have a direct connection to the master brand or to the other sub-brands ¹⁴ (though the relationship can be common knowledge).	<i>Master Brand</i>	<i>Examples of Sub-brands</i>
		Proctor & Gamble	<ul style="list-style-type: none"> • Pantene • Head & Shoulders • Gillette
		ConAgra Foods	<ul style="list-style-type: none"> • Healthy Choice • Chef Boyardee • Orville Redenbacher
		General Motors	<ul style="list-style-type: none"> • Chevrolet • Buick • Cadillac
Brand Alliance	Refers to a “cooperative association” between two or more entities. Companies often form brand alliances for the purposes of “joint branding” of a product or achieving mutually beneficial goals. ^{15, 16}	<i>Brand Alliance</i>	<i>Example of Jointly Branded Products</i>
		Pepsi and NutraSweet	Diet Pepsi
		Nestlé and Pillsbury	Haagen-Dazs
Branded House	A structure in which the master brand acts as an “umbrella for a wide product line.” ¹⁷ In this case, products have a direct association with the master brand by including the master brand name in each product.	<i>Master Brand</i>	<i>Example of Sub-brands</i>
		Nike	<ul style="list-style-type: none"> • Nike Air Force 1 • Nike Jordan • Nike Zoom
		Honda	<ul style="list-style-type: none"> • Honda Civic • Honda CRV • Honda Fit
		Sony	<ul style="list-style-type: none"> • Sony PlayStation • Sony VAIO

4.8.3 Implications for the Massachusetts Brands

Programs must weigh the risks and rewards associated with each strategy based on their current position in the market and relationships with other brands. At present, the three Massachusetts energy efficiency brands included in this study do not fit neatly into any of the categories presented above. However, marketing materials and plans suggest that there have been some efforts to link the Cool Smart and GasNetworks programs with Mass Save through use of the Mass Save logo and the integration of the Cool Smart microsite within www.masssave.com. This relationship is informal, but to some extent is in partial alignment with the House of Brands strategy described in Table 13 above.

The following are some of the key considerations for the PAs in managing the energy efficiency brands within the state if a decision is made to maintain multiple brands.

¹⁴ Aaker and Joachimsthaler, 10-11.

¹⁵ Brian A. Vander Schee, et al., “Nestlé: Brand Alliances in Developing Markets,” *Journal of Advancement of Marketing Education* 18 (2011): 32.

¹⁶ Rao and Ruekert, 87-88.

¹⁷ Aaker and Joachimsthaler, 8.

- At present, there is no evidence to suggest that having coexisting brands in the market is causing confusion. Contractors generally associate Cool Smart and GasNetworks with rebates for their respective technologies: heating and cooling. As such, they offer distinct value propositions, and target specific contractors installing each type of equipment. Similarly, contractor responses did not indicate that they are confusing Cool Smart and Gas Networks with Mass Save. Far more contractors associated rebates for heating and cooling equipment with Cool Smart and Gas Networks than with Mass Save. Many contractors also understood that related services aimed at residential customers, such as home energy audits, are offered through Mass Save and not Cool Smart or Gas Networks.
- Given that aided awareness of Mass Save is significantly higher than that of Cool Smart or GasNetworks, emphasizing the relationship between the programs and the state's umbrella brand has the potential to enhance awareness of the individual programs if the PAs continue to use all three brands. In addition, based on the fact that attitudes toward all three brands are overwhelmingly positive, a closer relationship between them could lead to reputation-building benefits, particularly for Cool Smart, which has slightly lower, yet still high, favorability ratings (86%). However, the opposite scenario in which feelings about Cool Smart detract from the other brands is also possible.
- While each of the brands has key similarities, there appears to be little risk of competition. Further, with closer association, there may be some risk that the individual brands become weaker on their own. However, given the high levels of awareness and favorability enjoyed by all three brands, this seems unlikely.

As mentioned above, the House of Brands model is likely the best fit for these brands as Mass Save already serves as an umbrella brand for many of the programs being offered and there have already been some informal efforts to link Mass Save to Cool Smart and Gas Networks. In addition, the Branded House model may present future benefits to the PAs should the market change. More specifically, the high levels of awareness and favorability associated with Mass Save may create an opportunity to unify marketing and outreach around the state's umbrella brand in the future. Moving statewide marketing in this direction, however, would require additional creative effort and funding. The following are considerations in positioning Mass Save as a master brand in the state:

- There is the potential for decreased program participation or market confusion if the move towards using Mass Save exclusively is not well planned and clearly communicated. This is due to the fact that HVAC contractors currently associate the heating and cooling work they do more strongly with Cool Smart and GasNetworks than Mass Save, which has a wide range of associations.
- Targeted marketing efforts aimed at contractors will be needed to supplement the current Mass Save marketing strategy in order to increase contractor understanding of what Mass Save offers, and as part of that effort, to link heating and cooling equipment rebates to the brand. More prominent co-branding of the Cool Smart and GasNetworks programs with Mass Save is one potential channel through which the Mass Save team can build associations between the statewide brand and existing programs. This approach appears to have been used successfully in the residential sector in re-branding the Home Energy Services Program formerly known as Mass Save.
- Under this scenario, the Cool Smart and GasNetworks brands would be formally linked to Mass Save with the latter serving as an umbrella for the state's energy efficient heating and cooling programs. The individual program names would remain and serve as an indicator to contractors of the services provided. This approach allows for the Cool Smart and GasNetworks brands to maintain some of their identity while becoming more closely aligned with the statewide marketing strategy. Overall, this

approach allows for clearer and more consistent messaging across all of the target audiences in the state.

Overall, our research indicates that there are both pros and cons to moving toward the Branded House model in which the Cool Smart and GasNetworks brands would be formally consolidated under the Mass Save umbrella. Further, we note that there are additional implementation and policy considerations that may not have been captured in this study, but which would impact whether this approach is feasible or not. As shown in Table 14, while there are potential drawbacks if integration is not well managed, closer alignment of all three brands could lead to a more consistent framework for energy efficiency related communications in the state. In addition, it could help to create a consistent experience for both PA customers and contractors.

Table 14. Pros and Cons of Unification under Mass Save

Potential Impacts	
Pros	<ul style="list-style-type: none"> Consistent and clear messages: both customers and contractors receive the same information
	<ul style="list-style-type: none"> Consistent and clear source for information
	<ul style="list-style-type: none"> Potential for increased familiarity
	<ul style="list-style-type: none"> Potential to increase reach through the pooling of marketing resources
Cons	<ul style="list-style-type: none"> Potential for confusion in the market if not well coordinated or communicated
	<ul style="list-style-type: none"> Requires more funding for a Mass Save targeted contractor marketing strategy
	<ul style="list-style-type: none"> Diminished associations with the supply-side contractor brands

5. Conclusions

The GasNetworks and Cool Smart programs do not have a defined brand strategy; however, it is clear that contractors have expectations around these programs, as well as a related understanding of the unique experiences they offer. It is these mental associations among contractors that constitute the program brands.

In terms of the marketing and outreach strategies employed by each program, the use of clear and recognizable messages was somewhat mixed.

- Marketing and outreach for the Cool Smart program has both a target audience and a distinct set of core messages. In particular, Cool Smart marketing efforts are effective at conveying to contractors messages related to quality installation and differentiation in the market. While program staff do not have a defined brand strategy, their long-term marketing efforts have helped to create contractor expectations and associations with the program, which are at the foundation of any brand.
- In contrast, GasNetworks has relied on a much broader set of marketing messages to engage its target audience. However, its program design emphasizes promoting rebates for energy-efficient equipment, as opposed to other benefits such as contractor training, which are emphasized by the Cool Smart program. As a result, we see high levels of program awareness and knowledge of what the program offers.

Although messaging has varied, it is clear that the Cool Smart and GasNetworks programs have been successful in promoting program awareness. In particular, awareness levels over 60% are a significant achievement. Given the long tenure of these programs, however, it is impossible to determine which of many factors, including marketing, may have contributed to the high levels of awareness seen today.

Overall, our research indicates that awareness and favorability of all three brands is moderate to high. Further, in terms of the interaction between the three brands, we found that there is no definitive relationship between awareness and attitudes toward Mass Save, GasNetworks, and Cool Smart. More specifically, we looked for potential relationships between awareness and attitudes toward the various brands, but there were no clear correlations largely due to the very high levels of Mass Save awareness and favorability.

Appendix A. Works Reviewed

Allen P. Adamson. 2006. *BrandSimple*. New York, NY: Palgrave Macmillan.

David A. Aaker, "Measuring Brand Equity Across Products and Markets," *California Management Review* 38 (1996): 102-120.

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Henrik Uggla, "The corporate brand association base: A conceptual model for the creation of inclusive brand architecture," *European Journal of Marketing* 40 (2006): 785-802.

Brian A. Vander Schee, et al., "Nestlé: Brand Alliances in Developing Markets," *Journal of Advancement of Marketing Education* 18 (2011): 32-38.

Appendix B. Survey Instrument



GasNetworks-COOL
SMART Contractor S

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