

Memorandum

To:

From: Amanda Dwelley, Antje Flanders, Jenny Nelson (Opinion Dynamics)

Date: December 6, 2013

Re: Rhode Island SRP Pilot Participant and Non-Participant Research Findings

This memo provides initial findings from two SRP Pilot evaluation research efforts conducted in 2013: The SRP non-participant focus groups and preliminary findings from the EnergyWise participant surveys.

The focus groups were designed to explore non-participants' understanding of program offerings that have been marketed by SRP efforts, identify perceived barriers to participation, identify participation levers, and gauge the effectiveness of over-arching marketing messages and concepts. The EnergyWise participant surveys are an ongoing evaluation effort that will provide both process and impact insights. The primary goal of the surveys is to determine an SRP marketing influence rate or "take rate" that will be used to estimate incremental participation in both EnergyWise and Small Business Direct Install programs. This rate will be calculated and reported for the first time in 2014 as part of the program year 2013 Focused Energy Efficiency impact evaluation. Here, we report on survey findings from a process evaluation perspective, to provide National Grid with initial feedback on marketing awareness, recall and influence.

Please note that the findings and implications from both of these research efforts – focus groups and participant surveys – will also be integrated into the "2013 Marketing Effectiveness Analysis and Survey Research Report", which will be compiled in 2014.

1. Residential Non-Participant Focus Group Findings

Opinion Dynamics conducted two focus groups on November 13, 2013 with residential customers in Tiverton and Little Compton. We selected participants who (a) have been the target of increased SRP marketing, (b) were eligible to participate in the DemandLink WiFi Programmable Controllable Thermostat program (they had wireless internet and either Window AC or Central AC and in their home), but (c) who have not yet participated in a DemandLink program. The research team recruited a mix of participants based on their level of prior engagement with the program; the table below describes the final breakdown.

Table 1 Summary of Focus Group Participants by Program Engagement Level

Level of Engagement	Demand Link Non-Participant Type	Number of Participants
Non-Engaged Customers	RAM did not reach	1
	RAM reached but did not convert to any program	4
Semi-Engaged Customers who have not participated in DemandLink	Demand Link Leads (DL or DL + EW) before Sept 1, but have not yet participated in Demand Link	4
	EnergyWise or Window AC participants during SRP period who have not participated nor become a lead for DL	2
	EW Only Leads during SRP period but before Sept 1 who may have WAC or CAC, but have not yet participated in anything	1
	Total	12

Three-quarters of focus group participants had window air conditioning and about a third had central air conditioning. Additionally, participants represented Tiverton and Little Compton equally.

1.1 Key Findings

Clarity of Program Offerings

The focus groups revealed that marketing materials for the DemandLink Programmable Controllable Thermostat program did not provide customers with a clear understanding of the program. While participants generally understood that equipment would be provided to them through the program, the concept that they would have to participate in Demand Response events and that the equipment would facilitate participation in these events was lost almost completely.

Barriers to Participation

The discussions revealed a number of common barriers to participation in the DemandLink program. Participants' general lack of understanding of how the program works, what the main benefits are and how those benefits apply to them present initial hurdles. In addition, participants voiced common technical concerns including how the equipment would interface with their existing HVAC systems, whether they use their window AC enough to qualify for the program or to justify the need of supplemental equipment to automate a cooling schedule. Participants were wary of losing their control over their cooling and perceived the incentive amount as low relative to the loss of control they may endure.

Drivers to Participation

Participants were mixed on hypothetical reasons for participating in the DemandLink Program. A few participants asked about the possibility of using the thermostat to remotely control their heating. They seemed less interested in remotely controlling their cooling system, which many did not perceive to be a significant expense, and thought the equipment might be valuable if it could also control heating. Once the

moderator gave the groups an explanation of why National Grid was offering the DemandLink program in their communities, they also appeared to be receptive to taking a proactive stance to improving grid reliability.

Messaging

While participants were mixed on the appeal of various messages, there was a clear interest in a more transparent message. National Grid should consider building a narrative around why they are offering this program, why Little Compton and Tiverton are being targeted, what the Demand Response component of the program entails, and how it relates to the provided equipment.

National Grid may want to consider highlighting the ability of the programmable controllable thermostat to control heat in addition to cooling remotely and the possibility of being able to save money on both.

Additionally, one of the main findings from both groups is that participants have many complex questions about how the DemandLink program and the related equipment work that may not all be possible to address in a single marketing piece. National Grid may want to consider putting together a “frequently asked questions” document or webpage to supplement the information they cannot fit into DemandLink marketing materials.

1.2 Detailed Findings

1.2.1 DemandLink Programmable Controllable Thermostat Program

This section provides findings and example of participant questions and comments for each component of the conversation, organized around the focus group discussion guide.

Top of Mind Awareness of “DemandLink”

We asked participants to provide top-of the mind associations with the term DemandLink.

- Top-of-mind awareness of the DemandLink Program is low - none of the participants recalled hearing the term DemandLink prior to the focus groups.
- At the same time, none of the participants had any negative connotations with the term “DemandLink”

The moderator provided focus group participants with marketing materials describing the DemandLink Programmable Controllable Thermostat Program – materials that they should have received in the mail between April and June 2013. The moderator asked the participants to look over the materials, rate them based on the level of clarity of the description of equipment, how to receive the bill credit, who is eligible to participate and how to sign up or learn more, and share any outstanding questions. The moderator then provided participants with a thorough explanation of the program and fielded a second round of questions. Participants discussed a number of questions and areas of uncertainty regarding these materials, summarized below.

Clarity of Concepts: Program Equipment

- Participants thought the explanation of the DemandLink Thermostat and Smart Plug provided in the DemandLink marketing materials were either clear (5 participants) or somewhat unclear (7).

- Participants questioned how the individual pieces of DemandLink equipment relate to one another and other HVAC systems in their home. Some of their questions included:
 - *Will a participant be able to control their heat using the DemandLink thermostat?*
 - *Will a participant be able to control their heat using the DemandLink thermostat if they have window AC?*
 - *How does the SmartPlug relate to the thermostat?*
 - *Is the SmartPlug intended to work with window units, Central AC or both?*
 - *What is the maximum functional distance between the thermostat and SmartPlug?*
- Participants were unclear about value added by the DemandLink equipment. For example:
 - *How is the program thermostat different from other programmable thermostats people already have in their homes? Does it have an additional benefit?*
 - *How does the SmartPlug make controlling the temperature easier than just turning the A/C unit on or off or using automatic temperature controls on the unit?*
- Once the moderator clarified the Demand Optimization aspect of the program, participants wondered how the program works if there are multiple thermostats in the home. For example:
 - *Will the program thermostats replace all of the existing thermostats in the home? If National Grid calls a demand optimization event, can I turn the other non-DemandLink controlled AC zones or units on?*

Clarity of concepts: What you need to do to receive the annual bill credit

- When we asked participants about the level of clarity of what they would need to do to receive the annual bill credit, all but two claimed that it was clear. Upon further probing, it became apparent that participants' narrative of "participation" differed from actual participation activities. Participants loosely described participation as receiving equipment to control their air conditioning system and did not mention agreeing to allow National Grid access the equipment for Demand Optimization events.
- Further discussion uncovered uncertainty among focus group participants about their understanding of "participation":
 - How does the thermostat cut costs?
 - What are the benefits to the customer for participating?
 - How does National Grid benefit from participation?
- A few customers questioned if anyone else has control over the thermostat. These participants tended to be more knowledgeable about the energy industry.
- There was a noticeable lack of awareness and understanding of the program's demand optimization component and technical terminology.

Clarity of concepts: Demand Response Component

- The moderator fielded questions from focus group participants after providing them with a detailed description of the DemandLink WiFi Programmable Controllable Thermostat Program. Questions included:
 - *How long would an event last?*
 - *Will National Grid stagger the events across participants?*
 - *Will National Grid have control over my heat too?*
 - *How will I know when an optimization event has been called? (Is there an indicator on the SmartPlug that identifies when an event is occurring?)*
 - *How difficult is it to opt out?*
 - *If a participant opts out are they required to return the equipment?*

Clarity of concepts: Eligibility and How to Sign Up

- Participants reported a full understanding of who is eligible for the program (all 12 said it was clear). However, some questions and concerns did come up in the discussion.
- Some expressed uncertainty regarding whether their limited use of their air conditioner would affect their eligibility for the program.
- Participants in both groups expressed confusion about why Little Compton and Tiverton were the program's target, believing these areas do not use much energy.
- After receiving a full program description from the moderator, a handful of participants in the groups voiced concern about National Grid's action of targeting their community for a program that would require participants to compromise comfort. They cite other businesses treating Little Compton and Tiverton as "expendable" in the past.
- Participants did not have questions about how to sign up for DemandLink.
- There was some interest in a website with more information about the program.

Barriers to Participation

- Once they had received a detailed description of the DemandLink WiFi Programmable Controllable Thermostat Program, the moderator asked participants to discuss the concerns they might have about participating. Concerns included:
 - Loss of control over cooling.
 - Length of a time a demand optimization event lasts. For example:
 - *"Well, I think if you get one of these demand optimization events how long might they power you down? I mean it's one thing if they power you down for a short period of*

time, but if you're in the middle of a two to three day humid event and they're going to be shutting you down for a long period of time, that's another matter."

- Length of time a demand optimization event lasts relative to the amount of space being cooled:
 - *"...We just have these two small window units...They're not powerful it's just enough to take the real - the heat out. So, a half hour of that being off might be a lot more than a whole house that's already cooled with the central air being off for a half an hour."*
- Participants also expressed concern about the ability to opt out and potential level of involvement that would be required to do so. Concerns included:
 - *Would a customer need to return the thermostat?*
 - *If so, would customer need to pay someone to swap out the program thermostat for the original thermostat?)*
- Participants perceived the incentive amount as low relative to the loss of temperature control they may endure.
- There was also some uncertainty among participants about whether or not the program would be compatible with the home's heating and cooling setup.

Benefits of Participation

The moderator asked participants to discuss the benefits and other aspects of the program they found appealing. Participants expressed mixed thoughts on the benefits.

- Participants found the following to be appealing:
 - Equipment's (potential) ability to control heating: A few participants asked about the possibility of using the thermostat to remotely control their heating, and thought the equipment might be valuable if it could also control heating. They seemed less interested in remotely controlling their cooling system.
 - Some participants also mentioned the appeal of avoiding brownouts and other peak load problems by allowing National Grid to manage loads in the community.

Messaging

- There is an interest in messaging with more transparency. Once the focus group participants were made aware of the Demand Optimization Event aspect of the program and had an understanding of why their communities were selected as the target of the program they identified the two as a critical pieces of the program's narrative that should be more apparent in the program's informational materials.

Motivators to Participation

We presented focus group participants with a list of arguments for why someone might choose to participate in the DemandLink programs. We asked them to list the top two that resonated most with them and with what they thought would resonate with people in in their community. Responses were mixed:

Hypothetical Reason for Participating in Demand Link	Ranked as First Motivator	Ranked as Second Motivator	Total n
Lower energy bill for you	4	3	7
Lower greenhouse gas emissions	3	5	8
Improved grid reliability	3	3	6
Free equipment	2	0	2
Good for local economy through lowering energy bills	0	1	1
Total Responses	12	12	24

1.2.2 DemandLink Window Air Conditioner Rebate and Recycling Programs

The moderation provided focus group participants in the second session with marketing materials describing the DemandLink Air Conditioner Rebate and Recycling Programs – materials that they should have received in the mail between April and June 2013. They looked the materials over and shared initial questions or concerns, such as:

- Customer Eligibility - *Do we have to participate in the DemandLink Wifi Programmable Controllable Thermostat Program to be eligible for the Rebate and Recycling programs?*
- Equipment Eligibility - *Do EnergyStar units qualify? Is there a size requirement?*
- Technical terms - *What is EER? Is that something that is on the equipment’s label?*
- Recycling logistics - *Where can the equipment be recycled?*

2. EnergyWise Participant Survey Findings

2.1 Sampling

Between May and October 2013, the Evaluation Team fielded two versions of an online survey among EnergyWise participants in with Tiverton and Little Compton. Both surveys explored recall and influence of statewide and DemandLink specific marketing and outreach efforts; drivers for participation in the EnergyWise and DemandLink programs; and levels of satisfaction with DemandLink thermostat equipment. The second version also included questions about usage patterns and levels of satisfaction with DemandLink thermostat and SmartPlug equipment.

We fielded the first version of the survey in May through October of 2013, among 196 participants who participated in the EnergyWise program between January 1, 2012 and April 16, 2013, and had valid email addresses. We fielded the second version of the survey, which included updated marketing materials, in October 2013, among 112 customers who participated between April 16, 2013 and September 15, 2013. Across both survey versions, a total of 71 participants completed the survey.

The initial survey frame included 570 accounts that participated in the EnergyWise program from 2012 to 2013. We removed participant records with missing email addresses. Table 2 below shows the final disposition.

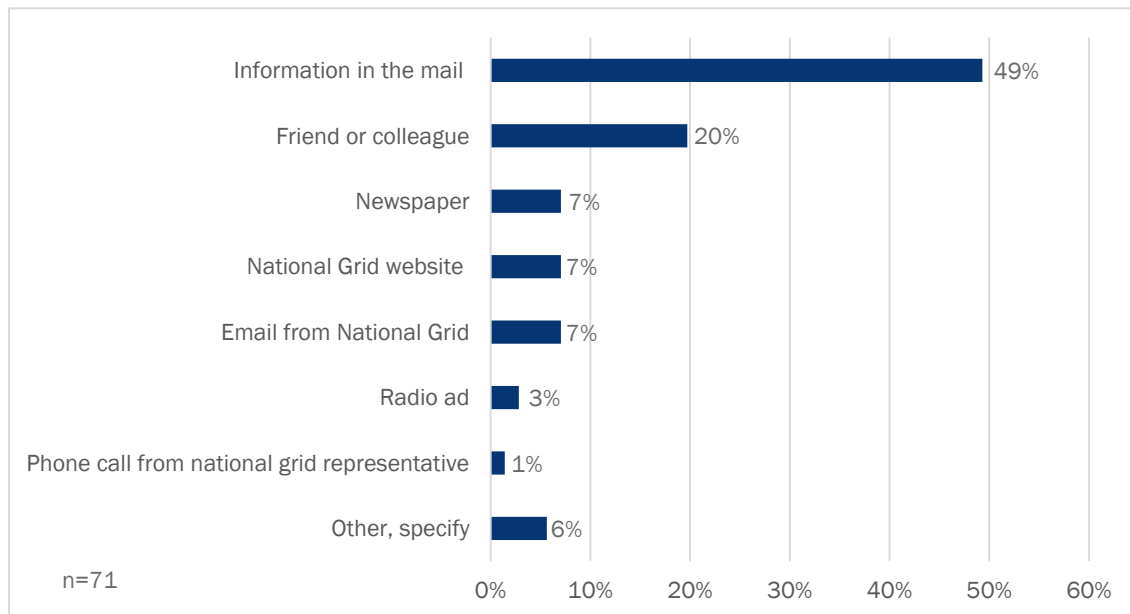
Table 2. Sample Frame and Survey Completes

	Participant in EnergyWise Only	Participant in EnergyWise & DemandLink	Total
Total Population	487	83	570
Included in sample (have email address)	227	81	308
Not included in sample (no email address)	260	2	262
Total Survey Completes	39	32	71

2.2 Recall and Influence of Marketing

Respondents most commonly report they first became aware of the EnergyWise program through information they received in the mail (49%) and word of mouth from a friend or colleague (20%).

Figure 1. How did you first become aware of the EnergyWise Home Energy Assessment and the energy efficiency improvements available from National Grid?



Consistent with this finding, respondents’ recall of direct mail was relatively high. In both versions, recall of the direct mail pieces associated with the DemandLink Program was the highest of all marketing materials about which we inquired (53% in Version 1 and 76% in Version 2). In contrast, recall of the direct mail pieces associated with the statewide programs was much lower (24% in Version 1 and 40% in Version 2).

The top four most memorable marketing materials among Version 1 survey respondents were the DemandLink specific direct mail (51%), radio commercials (42%), phone calls from National Grid (41%), and the article in the Patch (35%). The most memorable marketing materials among Version 2 survey respondents were the DemandLink specific direct mail (76%), phone calls from National Grid (70%), and the EnergyWise specific direct mail (40%). Respondents to Version 1 of the survey recalled statewide banner ads, Twitter posts, paid search and Facebook posts least frequently. Respondents to Version 2 of the survey recalled Twitter posts, Facebook posts, the statewide emails and statewide banner ads least frequently. The following tables display the recall and influence of each marketing effort.

Table 3. Summary of Recall and Influence of Marketing Materials: Survey Version 1

Marketing Effort	Campaign	Recall	n	Influence 4 or 5	n
Direct Mail	DemandLink	51%	35	61%	18
Radio	EnergyWise	42%	19	25%	8
Phone Calls	DemandLink	41%	37	33%	15
Article in Little Compton/ Tiverton Patch	DemandLink	35%	37	46%	13
Direct Mail	EnergyWise	27%	37	50%	10
Facebook Ads	DemandLink	21%	24	40%	5
Email	DemandLink	17%	24	50%	4
Email	EnergyWise	11%	37	25%	4
Newspaper	EnergyWise	11%	37	25%	4
Facebook Posts	DemandLink	6%	67	25%	4
Paid Search Ads	DemandLink	5%	19	0%	1
Twitter Posts	DemandLink	0%	19	0%	0
Online Banner Ads	EnergyWise	0%	33	0%	0

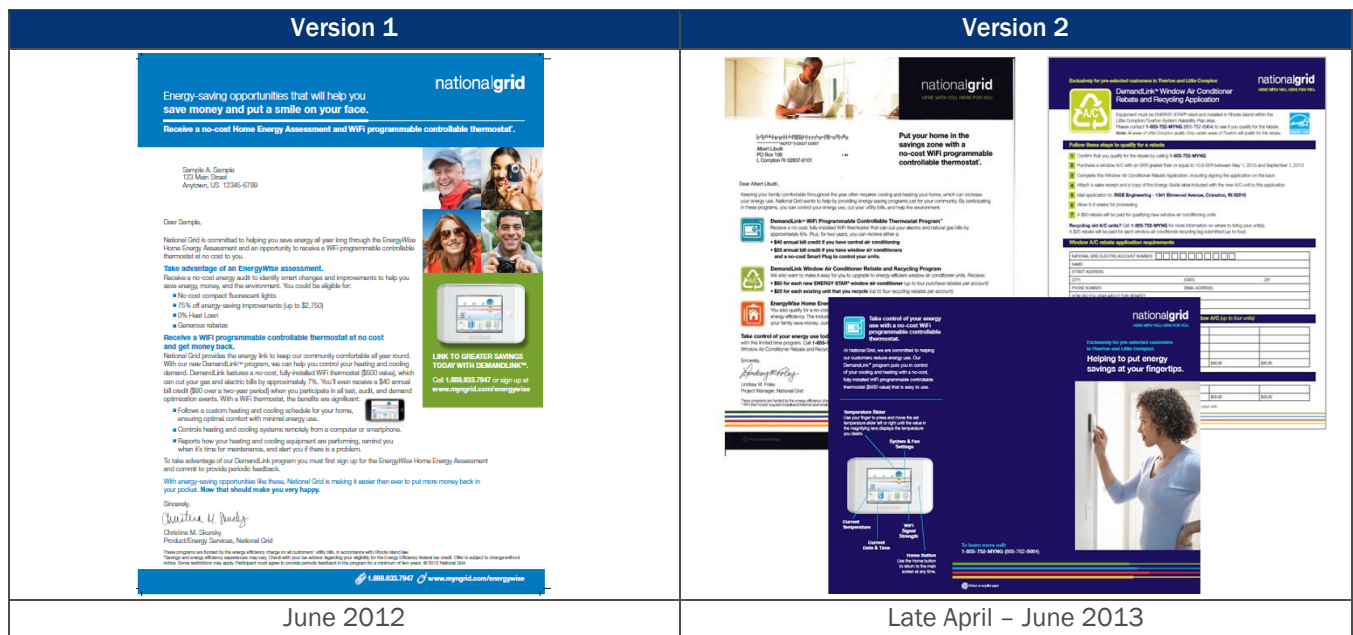
Table 4. Summary of Recall and Influence of Marketing Materials: Survey Version 2

Marketing Effort	Campaign	Recall	n	Influence 4 or 5	n
Direct Mail	DemandLink	76%	29	73%	22
Phone	DemandLink	70%	30	71%	21
Postcard	DemandLink	50%	2	0%	1
Direct Mail	EnergyWise	40%	30	58%	12
Newspaper	EnergyWise	27%	30	38%	8
Radio	EnergyWise	23%	30	29%	7
Paid Search Ads	DemandLink	23%	30	43%	7
Energy Awareness Day	DemandLink	21%	24	75%	4
Facebook Ads	DemandLink	20%	30	17%	6
Online Banner Ads	EnergyWise	17%	30	40%	5
Email	EnergyWise	7%	30	100%	2
Facebook Posts	DemandLink	3%	30	0%	1
Twitter Posts	DemandLink	0%	30	0%	0
Cinema	EnergyWise	0%	30	0%	0

2.2.1 Recall and Influence of DemandLink Specific Marketing

We provided survey respondents with images and descriptions of various marketing efforts they had been exposed to and asked them if they recalled seeing, hearing or receiving each item. If respondents could recall a marketing piece, we asked them to rate the level of influence it had on their decision to complete the home energy assessment. The following tables describe recall and influence of marketing specific to the DemandLink campaign. The next section describes recall and influence of statewide marketing.

Direct Mail



	Version 1	Version 2	Total
Recall			
Yes, I recall receiving this	51%	76%	62%
n	35	29	69
Influence			
Not Influential (1-2)	22%	5%	13%
Moderately Influential (3)	17%	23%	20%
Very Influential (4-5)	61%	73%	68%
n	18	22	40

Email Outreach

Version 1

nationalgrid

An energy-saving opportunity that will help you save money and put a smile on your face.

Get a WiFi programmable controllable thermostat at no cost and get money back*.

Our new DemandLink™ program is designed especially for your community to help control your heating and cooling demand. DemandLink features a no-cost, fully-installed WiFi thermostat (\$500 value), which can cut your gas and electric bills by approximately 7%. You'll even receive a \$40 annual bill credit (\$80 over a two-year period) for participating in the program.

With a WiFi thermostat, the benefits are significant:

- Follows a custom heating and cooling schedule for your home, ensuring optimal comfort with minimal energy use.
- Provides control of your heating and cooling systems remotely from a computer or smartphone.
- Reports, reminders, and alerts for peace of mind.

Get started today! To find out if you qualify, call 1-888-633-7947 or visit www.mygrid.com/demandlink

These programs are funded by the energy efficiency charge on all customers' utility bills, in accordance with Rhode Island law. *Savings and energy efficiency experiences may vary. Check with your tax advisor regarding your eligibility for the Energy Efficiency federal tax credit. Offer is subject to change without notice. Some restrictions may apply. To take advantage of our DemandLink program you must commit to provide periodic feedback. In order to receive the annual bill credit, you must participate in all load, audit, and demand optimization events. Participant must agree to provide periodic feedback in the program for a minimum of two years. © 2012 National Grid USA Service Company, Inc.

1.888.633.7947 www.mygrid.com/demandlink

September 2012

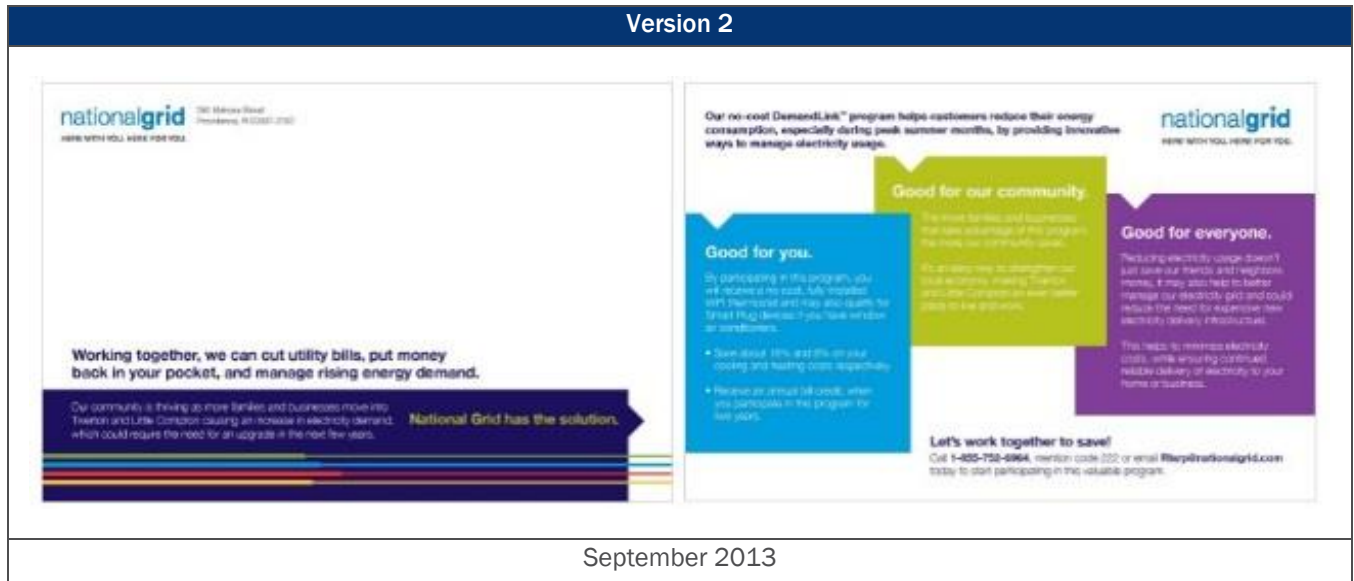
Survey Version 1	
Recall	
Yes, I recall receiving this	17%
n	24
Influence	
Not Influential (1-2)	25%
Moderately Influential (3)	25%
Very Influential (4-5)	50%
n	4

Newspaper Article

Version 1
Article in the Tiverton-Little Compton Patch. This article described how National Grid customers in Little Compton and Tiverton would be the first in the state getting the option to participate in a pilot program where participants get a WiFi programmable controllable thermostat and receive a credit for participating in demand response events.
May 2012

	Survey Version 1
Recall	
Yes, I recall seeing this	35%
n	37
Influence	
Not Influential (1-2)	31%
Moderately Influential (3)	23%
Very Influential (4-5)	46%
n	13

Postcard



	Version 2
Recall	
Yes, I recall receiving this	50%
n	2
Influence	
Not Influential (1-2)	0%
Moderately Influential (3)	100%
Very Influential (4-5)	0%
n	1

Phone

Version 1	Version 2
Do you recall being contacted by phone by National Grid about the opportunity to sign up for a free Home Energy Assessment and receive a no-cost, fully installed WiFi Programmable thermostat?	Do you recall being contacted by phone by a National Grid representative about opportunities for reducing energy costs in your home?
August-September 2012	Late April-August 2013

	Version 1	Version 2	Total
Recall			
Yes, I recall receiving this	41%	70%	54%
n	37	30	67
Influence			
Not Influential (1-2)	47%	10%	25%
Moderately Influential (3)	20%	19%	19%
Very Influential (4-5)	33%	71%	56%
n	15	21	36

Community Event

Version 2
National Grid hosted an Energy Awareness Day at Muddy Moose Café in Tiverton on July 16 th 2013. This event featured energy experts who were available to discuss ways to save money by participating in National Grid's DemandLink programs. Did you attend this event?
July 2013

	Version 2
Recall	
Yes	21%
n	24
Influence	
Not Influential (1-2)	25%
Moderately Influential (3)	0%
Very Influential (4-5)	75%
n	4

Facebook Ads

Versions 1 & 2	
<p>Tiverton & Little Compton myngrid.com</p>  <p>National Grid customers can save 7% on gas and electric costs with DemandLink™.</p>	
September-December 2012	

	Version 1	Version 2	Total
Recall			
Yes	21%	20%	20%
n	24	30	54
Influence			
Not Influential (1-2)	40%	17%	27%
Moderately Influential (3)	20%	33%	27%
Very Influential (4-5)	40%	50%	47%
n	5	6	11

Paid Search

Versions 1 & 2	
<p>Tiverton & Little Compton Get comfort year round. Save 7% on heating & cooling with DemandLink™. www.myngrid.com/demandlink</p>	
October-November 2012	

	Version 1	Version 2	Total
Recall			
Yes	5%	23%	16%
n	19	30	49
Influence			
Not Influential (1-2)	100%	0%	13%
Moderately Influential (3)	0%	57%	50%
Very Influential (4-5)	0%	43%	38%
n	1	7	8

Facebook Posts

Versions 1 & 2	
May-December 2012	

	Version 1	Version 2	Total
Recall			
Yes	7%	3%	6%
n	41	30	67
Influence			
Not Influential (1-2)	0%	0%	0%
Moderately Influential (3)	67%	100%	75%
Very Influential (4-5)	33%	0%	25%
n	3	1	4

Twitter Posts

Versions 1 & 2	
October-November 2012	

	Version 1	Version 2	Total
Recall			
Yes	0%	0%	0%
n	19	30	49
Influence			
Not Influential (1-2)	-	-	-
Moderately Influential (3)	-	-	-
Very Influential (4-5)	-	-	-
n	-	-	-

2.2.2 Recall and Influence of Statewide Marketing

The following tables describe recall and influence of marketing specific to statewide marketing efforts.

Direct Mail

Version 1	Version 2
	
May-October 2012	April 2013

	Version 1	Version 2	Total
Recall			
Yes, I recall receiving this	27%	40%	33%
n	37	30	67
Influence			
Not Influential (1-2)	50%	0%	23%
Moderately Influential (3)	0%	42%	23%
Very Influential (4-5)	50%	58%	55%
n	10	12	22

Email

Version 1	Version 2
 <p>0% Fit Tailoring. 100% Wise.</p> <p>An energy specialist that is a home that's fit. And as a National Grid customer, you have the opportunity to apply for our 0% interest financing offer when you make qualified energy-efficient improvements to your home as part of our EnergyWise program.</p> <p>To get started, schedule a no-cost energy assessment. An Energy Specialist will evaluate your home's energy usage and make recommendations to help you save on energy efficiency. We provide incentives and rebates toward the cost of energy-efficient insulation, air sealing, and heating and cooling system replacement. The no-cost measure, rebates, and incentives don't cover everything that was recommended by your Energy Specialist, but 0% financing offer can help you get it done.</p> <p>Get HouseFit today and get up to your savings. For more information, visit us at www.energysave.com</p>	 <p>An energy-efficient home is a home that's fit.</p> <p>To Get House Fit, schedule a no-cost home energy assessment through our EnergyWise program*. An Energy Specialist will evaluate your home's energy use and then make recommendations to help you save big on your energy costs.</p> <p>Your Energy Specialist will provide you with various products such as compact fluorescent lightbulbs and advanced power strips at no cost, to help you get a jump start on your energy savings! They will also tell you about available rebates and incentives to help you save on larger improvements such as insulation and replacement heating and hot water systems.</p> <p>If the rebates and incentives don't cover the entire cost of the improvements that were recommended by your Energy Specialist, you have the opportunity to apply for a 0% interest loan to pay for qualified energy-efficient improvements over time.</p> <p>Check out these informative videos about our 0% Financing Offer and our Home Energy Assessment.</p> <p>If you are ready to Get House Fit and pump up your savings sign up today!</p> <p>30.5%</p> <p><small>* These programs are funded by the energy efficiency charge on all customers' utility bills. In accordance with Rhode Island law, Must be a National Grid Rhode Island residential customer in a 1-4 unit home to be eligible for energy assessment and 0% financing. If you rent an apartment or own an industrial/commercial unit, you cannot apply directly to this program. Your building management must contact us directly to determine eligibility and enroll your building in the program. We encourage you to speak to your building owner about your interest. Offers are subject to change or cancellation at any time without notice. Savings and energy efficiency experiences may vary. See-also www.energysave.com the U.S. Department of Energy website, www.energysave.gov, and the ENERGY STAR website, www.energystar.gov. © 2013 National Grid.</small></p>
April 2013	

	Version 1	Version 2	Total
Recall			
Yes, I recall receiving this	11%	7%	8%
n	37	30	67
Influence			
Not Influential (1-2)	50%	0%	33%
Moderately Influential (3)	25%	0%	17%
Very Influential (4-5)	25%	100%	50%
n	4	2	6

Radio

Version 1	Version 2
Between October and December of 2012, National Grid aired a series of radio spots promoting the availability of energy savings programs for every person in Rhode Island. These spots featured various groups of Rhode Islanders – for example, hockey players, dog owners, gardeners, sports fans, and grill masters – visiting National Grid’s offices.	In April, National Grid began airing a series of radio spots promoting the 24 ways National Grid can help Rhode Islanders save energy and money on energy bills. These spots featured National Grid asking Rhode Islanders questions about the state– for example, “Can you name Rhode Island’s state tree”, “Can you name the states that border Rhode Island” and “Can you name the company that has 24 ways Rhode Islanders can save money?”
October-December 2012	April-September 2013


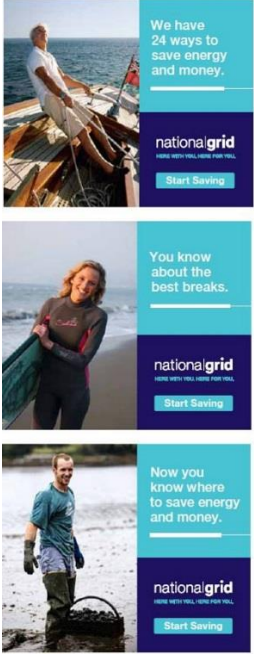
	Version 1	Version 2	Total
Recall			
Yes, I recall hearing this	42%	23%	31%
n	19	30	49
Influence			
Not Influential (1-2)	38%	29%	33%
Moderately Influential (3)	38%	43%	40%
Very Influential (4-5)	25%	29%	27%
n	8	7	15

Newspaper Ads

Version 1	Version 2
	
Winter/Spring 2012	April-September 2013

	Version 1	Version 2	Total
Recall			
Yes, I recall seeing this	11%	27%	18%
n	37	30	67
Influence			
Not Influential (1-2)	50%	50%	50%
Moderately Influential (3)	25%	13%	17%
Very Influential (4-5)	25%	38%	33%
n	4	8	12

Banner Ads

Version 1	Version 2
 <p>Blue cube slides over image and back to the left to reveal a new Rhode Islander that has saved.</p> <p>Blue cube slides over image and back to the left to reveal a new Rhode Islander that has saved.</p> <p>Blue cube slides over image and back to the left to reveal a new Rhode Islander that has saved.</p> <p>Clickes fade to blue. Call to action and logo fade in.</p>	
Winter/Spring 2012	April-September 2013

	Version 1	Version 2	Total
Recall			
Yes, I recall seeing this	0%	17%	7%
n	33	30	63
Influence			
Not Influential (1-2)	-	40%	40%
Moderately Influential (3)	-	20%	20%
Very Influential (4-5)	-	40%	40%
n	-	5	5

Cinema

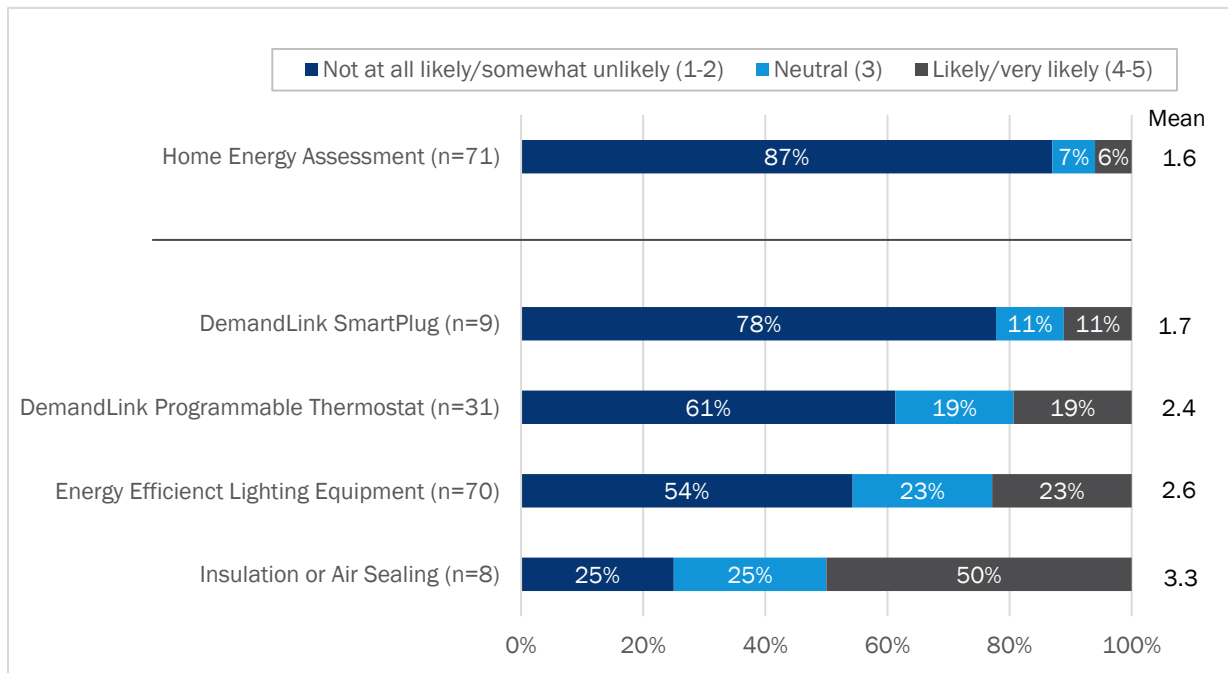
Version 2
<p>Ads at the cinema before a movie featuring trivia questions– for example, “Do you know how many islands are in Rhode Island” and “How many ways can Rhode Islanders save energy with National Grid?”</p>
<p>May-August 2013</p>

	Version 2
Recall	
Yes	0%
n	30
Influence	
Not Influential (1-2)	-
Moderately Influential (3)	-
Very Influential (4-5)	-
n	-

2.2.3 Energy Efficient Behavior in Absence of Program

Both surveys contained questions about the influence of EnergyWise on participants’ decision to receive an energy assessment and install energy efficient measures. The majority of respondents (87%) stated they were either “Not at all likely” or “Somewhat unlikely” to have completed an energy assessment if it had not been offered through EnergyWise. The table below illustrates participants’ estimates of the likelihood they would have completed a home energy assessment if it had not been offered for free through the EnergyWise program as well as the likelihood they would have installed the measures they installed through the program if they had not completed the energy assessment through the program.

Figure 2. Likelihood to Complete Measure without EnergyWise Program



We will field similar participant surveys in Q1 2014 to gather similar information on marketing and program influence from late 2013 EnergyWise participants. Then, we will aggregate data from all versions of the survey to (a) assess marketing effectiveness in the 2013 Marketing Effectiveness report, and (b) estimate a “take rate” that feeds into Focused Energy Efficiency impact evaluation.