

How'm I Doing?

Tracking the Effectiveness of Advertising an Energy-Efficiency Program

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ABSTRACT

The statewide Wisconsin Focus on Energy initially included umbrella advertising intended to overcome barriers of customer awareness and motivation to participate in energy-efficiency activities. The goals were to increase public awareness of the program; stimulate interest in obtaining additional information about energy efficiency opportunities, benefits, and actions; and encourage willingness to participate in actions to increase energy efficiency. It was recognized that success in achieving these goals would require significant investment, as well as time to gain the attention of consumers, persuade them of the value of the program, and interest them in moving forward.

To monitor the effectiveness of the umbrella advertising and obtain timely feedback, the sponsors and implementers established an evaluation process that would track selected metrics of customer awareness, program image, intent to seek additional information, and intent to engage in activities to increase energy-efficiency. The methods included a baseline telephone survey of 588 randomly chosen households and monthly tracking surveys of at least 150 households.

The first portion of this paper describes the survey results, which show modest increases in awareness of the Focus program and ENERGY STAR[®], as well as in favorability toward Focus. The paper next discusses unplanned reductions in umbrella advertising that limited the opportunity to determine the effectiveness of the approach, the reasons for the changes, and some lessons learned. The final part of the paper provides an extended look at a study of differential advertising investments in supporting a specific component of Focus, the Change-A-Light campaign to increase sales of compact fluorescent lamps.

Introduction

This paper was undertaken to provide a case study of the umbrella advertising of an energy-efficiency program, as monitored over the course of a full year. Several national and regional energy-efficiency programs have invested in broad campaigns designed to increase awareness of these programs, their offerings, and the benefits they can achieve for participants and for society. Distinguishing characteristics of these advertising efforts are that they are meant to support a broad portfolio of energy-efficiency activities rather than a single, specific program component and that they are intended to develop over months or even years, rather than over the course of a few weeks of intense advertising.

Efforts to evaluate short-term campaigns have shown that they have some effects on public awareness. However, little evidence has been developed for longer-term efforts and effects. (Notable exceptions include the work of the Energy Saving Trust in the United Kingdom [Wallis 2003] and the state of Schleswig-Holstein in Germany [Wortmann & Möhring-Hüser 2003].) Several program evaluations have also raised concerns as to whether any effects have been achieved that are deeper than increases in awareness, such as changes in energy-related behavior. (See, e.g., DOA 2000.) Advocates of umbrella advertising efforts have countered that most evaluations have been too broadly focused, sporadic, and lacking in statistical power.

To address these issues, the authors undertook a year-long study of the umbrella advertising designed to support the Wisconsin Focus on Energy, a statewide energy-efficiency effort funded through system benefit charges on all customer classes in the state. Accordingly, the paper begins with a description of the key objectives of the umbrella marketing effort, the metrics by which the evaluation was to assess progress, the research design and methods employed, and the results to date. For several reasons, however, the umbrella advertising effort was severely reduced during the year, limiting the possibility that it would provide clear evidence of immediate effects, let alone longer-term impacts. The second section of the paper reviews the actual umbrella advertising inputs of Focus as well as the implications of the changes in what had been planned.

Funding for advertising to support some specific components of the Focus portfolio was maintained, however. In particular, the component-specific activities provided an opportunity to test the effect of differential advertising levels on customer response to Change-A-Light, a campaign to increase the sales of energy-efficient lighting products. The study of this effort, its effects, and their interpretation comprises the third portion of the paper.

The Umbrella Advertising Effort

Wisconsin's statewide Focus on Energy program includes a comprehensive marketing effort, led by an experienced advertising agency, Hoffman York (HY), and supervised by the sponsoring governmental organization, the Division of Energy in the Department of Administration (DOA). With the assistance of the program's evaluators, HY and DOA developed a detailed program theory for the cross-cutting marketing effort. This program theory described the barriers to be addressed and the first-year target results, as well as the types of promotions and channels to be used. In addition, it specified key indicators of success and the research methods that would be used to monitor the metrics selected.

Barriers included a lack of awareness of opportunities for increasing energy efficiency in the home; a lack of recognition of the ability to achieve relevant benefits; and anticipation of high transaction costs in obtaining useful information. The goals of the umbrella advertising were to increase public awareness of the program; stimulate interest in obtaining additional information about energy efficiency opportunities, benefits, and actions; and encourage willingness to participate in actions to increase energy efficiency over the multi-year period of the Focus program, with initial emphasis on developing awareness and a favorable image of the program.

HY and DOA understood that energy efficiency was not a new concept and that many customers believed they had already done what they could. Accordingly, HY and DOA expected that success in achieving their goals would require significant investment, as well as time to gain the attention of consumers, persuade them of the value of the program, and interest them in moving forward. The program theory posited that individual components of the Focus portfolio could rely on and benefit from growth in these areas, which would complement and supplement the more specific advertising messages that were part of the larger advertising effort.

Of most interest here, HY and DOA agreed that the umbrella advertising to residential customers would be monitored through specific metrics that would be assessed in customer surveys. The effort would begin with an extensive baseline survey; progress would be observed through monthly tracking surveys; and overall achievements would be assessed with another extensive survey at the end of the program year. Thus, Focus offered an opportunity to study advertising efforts with clearly defined objectives, in a relatively sustained manner and with greater resources than are often available for such work.

Metrics for Assessing Progress

In keeping with the program theory, five metrics were identified for tracking, pegged to the major activities of the first contract year. The core activity would be to create awareness of Focus throughout the state.¹ Moreover, efforts would be made to ensure that awareness of Focus would be accompanied by an overall positive image of the program. Particularly in the residential sector, the advertising messages were to build on and increase awareness of ENERGY STAR[®], ensuring that program investments would be leveraged effectively and that campaigns would be coordinated and avoid confusing customers. In addition, HY and DOA agreed that indicators would include changes in the desire for additional information about energy efficiency and the intent to carry out energy-saving actions within the coming year, although relatively little effect was expected in these indicators during the early part of the campaign. Nonetheless, they wished to make clear their belief that changes in these metrics are central to the program theory.² Table 1 describes these metrics, the agreed-upon measurements, the baseline results and the targets for the year.³

Table 1. Metrics and Target Levels for Year 1 of the Focus Program

Metric	Measurement	Target Level	Baseline Level
Awareness of Focus	Total of unaided and aided recall (all respondents)	33 percent	20 percent
Attitude towards Focus	Percentage of positive responses to question on overall image (respondents aware of Focus)	65 percent	33 percent
Awareness of ENERGY STAR	Total of unaided and aided recall (all respondents)	10 percentage points above baseline	49 percent
Reported likelihood of seeking additional information about Focus	Difference in percentage of very or somewhat likely to seek additional information (respondents aware of Focus vs. those unaware)	10 percentage points higher	1 percentage point lower
Reported likelihood of engaging in behavior designed to save energy	Difference in percentage of very or somewhat likely to do so (respondents aware of Focus vs. those unaware)	4 percentage points higher	3 percentage points higher

¹ A pilot program using the same name had been conducted in the northeastern portion of the state for approximately two years prior to the statewide rollout.

² Of course the suggestion that advertising → awareness → information-seeking → action is highly oversimplified, omitting such issues as the comprehensibility of the new program information, its relevance to the situation of the recipient, the costs of action, etc. This skeleton model also ignores issues of the customer's perceived need, prior knowledge, personal efficacy, etc. These problems were studied extensively during the pilot program and measured in the baseline survey, but are not central to the metrics discussed here. The claim is not that every customer who becomes aware of the program will move seek additional information, and eventually act to increase energy efficiency, of course. It is only that the probability of each transition is increased by the advertising effort.

³ The targets were not developed from the baseline results. They were set aggressively, based on what proved to be incorrect assumptions about the available budget and on DOA's assurance that no penalties would be assessed for the first contract year (since the program, the approach, and the relevant mechanisms were all new).

Research Design and Methods

The data for monitoring the metrics were obtained through random-digit dialing (RDD) telephone surveys with customers selected from throughout Wisconsin. The baseline survey included 588 valid respondents; each subsequent monthly survey included a minimum of 150 respondents.⁴ All respondents are male or female heads of household, eighteen years of age or older, reached at their permanent residence.⁵ The response rate for the baseline survey, which averaged 20.5 minutes in length, was 20.7 percent. (See DOA 2002 for a full report of this study.) The mean response rate for the tracking surveys, which required 10-12 minutes, was 41.2 percent.⁶ However, as with many RDD telephone surveys, home owners and older respondents were disproportionately represented.⁷

The core questions in the monthly survey are those used to track the metrics. Other items repeated each month include measures of the importance of energy-related and other issues in the state, recall of energy-related advertising and program tag lines, and basic demographics. These data are intended to provide both the advertising agency and the sponsors with information that can be used to help understand movement or lack of movement in the metrics and responses to those results. The baseline survey also included measures on a variety of other topics, including a more detailed inventory of the Focus image, information-processing style, sources of information energy-related needs and benefits (the CLASSIFY™ segmentation) etc., to provide HY and DOA with information that would be useful for message selection.

Results

This paper describes the first three metrics introduced above. As indicated, HY and DOA agreed that the effects of the umbrella marketing should affect customer interest in learning more about energy efficiency and, ultimately, on customer intent (and follow-through) to participate in energy-efficient activities. However, they also agreed that these latter effects were likely to require some time and that only minimal impact would be achieved on these metrics in the first year of the umbrella advertising. (A recent report [DOA 2003] provides data on these; another paper [Rambo & Feldman 2003] discusses the relationship between information-seeking and intentions to act.)

Figure 1 displays the baseline and tracking results for the awareness and image metrics (awareness of Focus, awareness of ENERGY STAR, and overall positive image of Focus). Overall, awareness (total unaided and aided recall) of Focus has increased, from about 20 percent of respondents in the baseline survey to an average of 25 percent over the last three-month moving average. Moreover, the percentage of respondents who hold a positive image of Focus among those who are aware of the program has risen from the initial level of 33 percent to an average of 50 percent over the last three-month moving average. Even the awareness of ENERGY STAR has shown a slight increase (after a dip) from the initial level of 49 percent (total unaided and aided recall) to 51 percent in the most recent surveys. Thus, evidence of movement toward the advertising of the umbrella advertising objectives is available, although the results are modest.⁸

⁴ As will be discussed later, the monthly survey provided an opportunity for collecting additional data of interest to the program as required for studies of specific promotions.

⁵ Interviewers now select for male or female head of household according to a random assignment algorithm. This was not used in the baseline survey or the initial monthly tracking studies.

⁶ Completed interviews, divided by the sum of completes, refusals, mid-interview terminations, and sample points attempted but with no final disposition.

⁷ The data are not weighted in this report.

⁸ Umbrella advertising for Focus was not the only energy-efficiency advertising that took place, of course. Marketing for specific components of the Focus portfolio carried out relevant efforts (both through HY and through their own staff

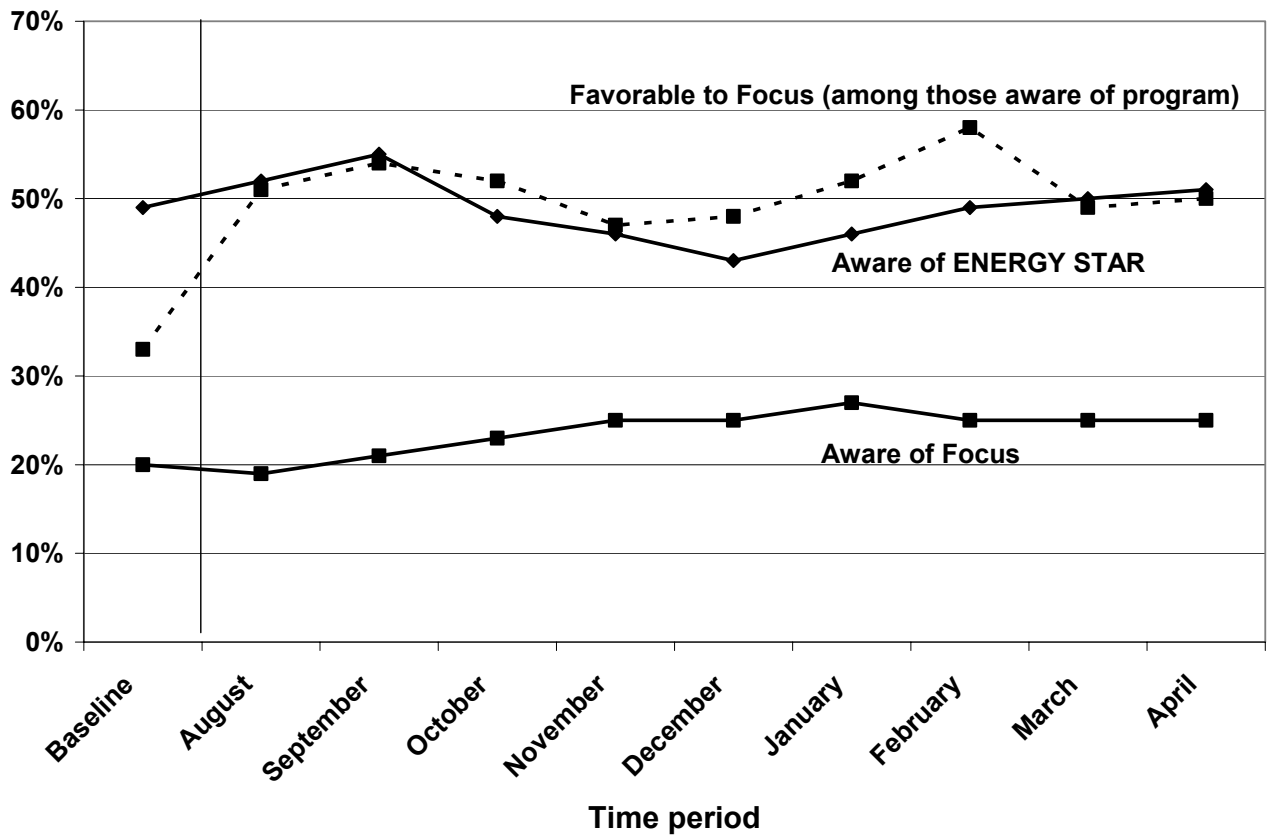


Figure 1. Awareness of Focus on Energy and ENERGY STAR; Respondent Favorability toward Focus among those aware of program (Baseline and 3-month moving averages)

Discussion

As planned, the tracking results have been reported to the sponsors, the advertising agency, and the marketing representatives of the Focus program on a regular basis since the first three months. These reports provide the sponsors and the implementers with ongoing information about progress in increasing public awareness of the program and stimulating interest in energy-saving information and action. In addition, they provide immediate trend data on other factors, such as issues competing for customer attention and the effectiveness of specific promotional efforts.

Thus, strong reasons exist for establishing and implementing a tracking survey such as that used for Focus. However, the commitment to this continuing evaluation effort limits resources available to study other issues that arise during the year. Also, the need for consistency in question wording, etc., can be problematic, when issues or approaches change.

Moreover, interest in the reports and the value they provide has been reduced by the fact that little change in the metrics has been observed from month to month. This lack of movement is due, at least in part, to the fact that the umbrella advertising effort itself has been severely curtailed. The reasons for this and the implications of the changes in program strategy are discussed in the next section of this paper.

marketing). Moreover, state utilities and other market actors continued to promote energy efficiency through independent efforts.

Unplanned Changes in Marketing Inputs and Their Implications

The initial changes in the awareness and favorability metrics are consistent with public relations and umbrella advertising for the official kickoff and first months of the statewide Focus program. However, after those initial marketing inputs, relatively little public relations or umbrella advertising were committed to the program.

Marketing Inputs

The umbrella advertising program did not receive the funding that had been initially anticipated, as a result both of growing state budgetary issues and of concerns about public perceptions of state-sponsored advertising during a fiscal emergency. Indeed, these concerns had already delayed the kickoff events and advertising for Focus and limited the initial effort. Moreover, the umbrella effort had already been scheduled for reductions in late October to avoid competition for media time/space and public attention during the election campaign.

The Focus public relations budget for the residential sector faced similar constraints. An important difference from the advertising budget, however, is the fact that a major effort was undertaken in August, to help support the program kickoff activities and continued into September.

Still, Focus advertising in the electronic media was not entirely absent during the last quarter of 2002. Of most importance, considerable air time was purchased to help promote the Change-A-Light campaign, discussed in detail in the next section of this paper. In addition, HY purchased some air time during December for umbrella advertising, and their efforts were aided by advertising by state utilities. Overall, however, Figure 2 shows clearly that Focus-purchased TV and radio advertising was limited in both time and weight. Data for print advertising directed at residential customers shows much the same pattern.

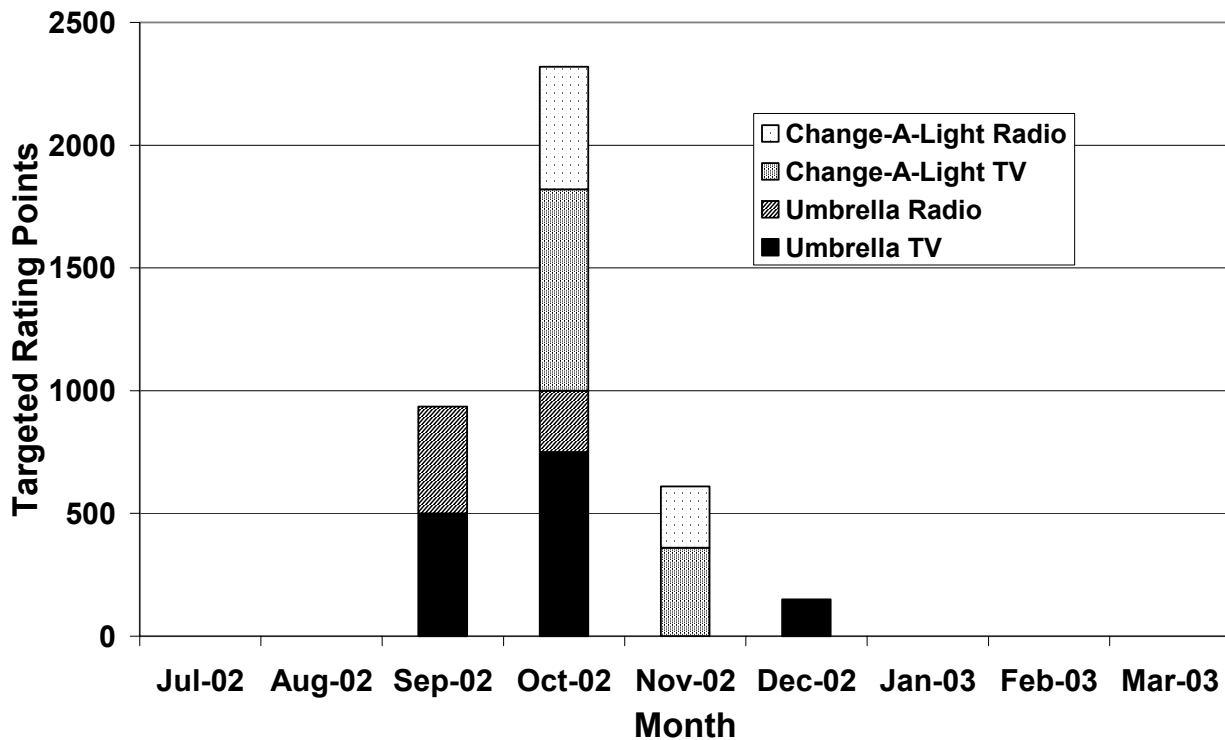


Figure 2. Focus advertising input by month (TV and radio)

Current Directions and Broader Lessons Learned

Wisconsin, as so many other states, is currently suffering from a significant shortfall in revenues and thus a budget gap that places severe constraints on the funding available for energy-efficiency programs. The governor and the legislature have continued to provide considerable support to the Focus on Energy program, but some trimming for future years is inevitable. In this context, the funding for every component of the program is under scrutiny. However, the support for advertising may be at particular risk, and the willingness to pay for umbrella advertising may be the least likely to survive. To some degree, therefore, the results of the tracking survey become particularly relevant to arguments for and against this type of advertising.

As indicated, the original intent of this paper was to provide a case study in which an advertising campaign for an energy-efficiency program was monitored over a reasonable period of time, with sufficient resources to provide a test of the effort's effectiveness in raising awareness and subsequent motivations and activity.

The tracking of advertising effects was conducted over the course of the first year, as originally intended, although the planned larger annual survey was eliminated. We believe this tracking effort had value to the overall Focus program in several ways, although not for the reasons originally intended. In brief, the tracking survey did demonstrate the initial response to advertising of Focus, as well as the later lack of effective movement of the selected metrics when the advertising effort declined. In addition, the tracking survey provided a vehicle for testing the effectiveness of a targeted advertising effort, aimed at a geographically selected target market. Finally, the tracking survey offers a case study of the practical difficulties in moving respondents to energy-saving actions through advertising.

In effect, tracking the attempt of the Focus marketing program to create an identifiable umbrella image that could be used to build program awareness and connections from one component of the program to another was never tested. Several factors account for this: An examination of these factors suggests what would be required for a reasonable test of the approach.

- All major stakeholders must believe in the program theory.
- The resources to carry out the activities identified in the program theory must be available.
- The time for an appropriate test of the program theory must be provided.

Stakeholder belief in the program theory. From the beginning of the marketing effort, various stakeholders either did not accept the program theory or did not believe it appropriate to the needs of Focus. Members of the first group do not believe that efforts to create broad-scale awareness of an energy-efficiency program can lead to verifiable behavioral effects. On the practical side, they can point to the fact that energy awareness campaigns have been mounted in the U.S. since the 1970s with limited lasting effects on public sentiment. These appeals appear to have inured a majority of residential customers to energy-saving appeals and convinced them that they already know about all they need to know, except in the presence of a serious crisis such as the California power shortage of 2000-2001. These considerations are bolstered on the theoretical side by the lack of specificity in appeals for action in an umbrella campaign—the absence of clear targets for action that psychologists indicate as necessary components of efforts to change attitudes or beliefs.

In addition, members of the second group believe that whatever resources are devoted to advertising and public relations efforts—rather than financial incentives or investments to address other non-informational barriers—should be in support of specific program components. They would argue, for example, that marketing dollars that directly advocate CFL purchases provide greater value than those that increase awareness of the overall program and *may* create an overall willingness to engage in relevant activities, such as the purchase of CFLs.

Resources to Carry Out Activities Specified in the Program Theory. It appears obvious beyond comment that the program theory cannot be—could not be—fully tested unless its advocates had the opportunity to carry it out. What may be a useful lesson, however, is to suggest that once the planned levels of investment and activity for Focus advertising were reduced below those required to conduct an effective umbrella campaign, the program theory and its implications should have been revisited and a new approach, consistent with the available resources, should have been developed. The tracking survey indicated how little the metrics were moving and the low likelihood that the goals would be reached. Despite the hope that the original budgets would be reinstated, the evaluators, the sponsors, and the marketing coordinator should have addressed the issue more immediately.

Time for the Test Must Be Provided. From the beginning, it was recognized that considerable time would be required to achieve the sought-for effects, if the program theory were correct. The first year was seen as a time for building awareness of the program and its components, with relatively little effect of the umbrella advertising on the success of those individual components. This strategy was expected to pay off in later years, as customers engaged in specific actions, recognized that they had the power to change energy consumption for themselves and society, and connected relevant actions in one sphere of activity (e.g., saving in their homes with CFLs) with those in other spheres as well (e.g., saving energy through community actions, such as retrofitting their libraries).

Although the underlying theory may be valid, it ignores the practical reality of almost every energy-efficiency program. Even if the program is not one that must be re-authorized yearly by a regulatory commission, it is likely to be scrutinized annually, whether by a board of directors or a committee of state legislators. Accordingly, the program must demonstrate the ability to meet short-term goals: Large, visible investments such as those in a broad-scale advertising campaign are likely to be held to an especially stringent standard. Those that do not contribute directly to savings or readily identifiable market effects are unlikely to receive continued funding.

In retrospect, the attempt to develop an umbrella market identity for the Focus program, decoupled from specific behavioral and savings targets, with a strategy requiring high investments and a perspective across several years may have been doomed from its inception. Xerox may have been in a position to create an overall corporate image that the company could later exploit. Energy-efficiency programs are not.

The Tracking Survey as a Vehicle for Targeted Evaluations

Although the funding for umbrella advertising of Focus was reduced early in the year, money to support specific components of the program portfolio remained. This provided an opportunity to study advertising in support of a one element of the residential program offerings, and illustrates the value of having a tracking system in place as an aid to rapid and effective application of evaluation resources to unforeseen opportunities.

Background and Issues

The residential program administrator for Focus, the Wisconsin Energy Conservation Corporation (WECC), joined in the Change-A-Light effort. This nationwide effort, coordinated through ENERGY STAR, was designed to increase the market penetration and sales of compact fluorescent lamps (CFLs) during October and November, the traditionally high volume months for lamp sales. As part of this effort, WECC increased its contacts with lighting retailers across the state and worked with the marketing administrator to develop and place relevant advertising.

At the same time, WECC identified the need to increase marketing in the La Crosse-Eau Claire region, the fourth largest in the state, which had received less emphasis than the Milwaukee, Madison, and Green Bay regions. As a result, HY's media placement plan included disproportionate TV and radio advertising weights in the La Crosse-Eau Claire region. (Specifically, over the seven-week test period, the target area received broadcast TV spots worth 1,000 Targeted Rating Points and cable TV spots worth 180 Targeted Rating Points, compared with broadcast TV spots worth 750 Targeted Rating Points in the rest of the state.⁹ In addition, the target area received 72 radio spots.) This provided an opportunity to test whether the heavier advertising in this region would be reflected in greater changes in awareness of Focus and ENERGY STAR, interest in CFL purchases, and actual CFL sales.¹⁰

Method

Only slight modifications to the tracking survey were required. First, oversamples of respondents in the targeted region were obtained in both the October and November surveys, during the period when the Change-A-Light campaign was in effect. Second, a short battery of items was added to the questionnaire, to probe for awareness of CFL-related advertising, as well as interest in and reported purchasing of CFLs. (In fact, the questions about purchases and intentions to purchase CFLs had been added to the survey in August, in anticipation of the Change-A-Light campaign. This provided a baseline for the state as a whole, although the number of respondents in the La Crosse/Eau Claire region was small during August and September.)

Results

The increased weight of the advertising in the La Crosse-Eau Claire region appears to have had a small, but consistent incremental effect on respondents' awareness, intentions, and behavior. Although no individual metrics show statistically significant differences,¹¹ all show trends in the same direction.¹²

First, as would be expected, a greater percentage of respondents report having seen or heard advertising for CFLs during the Change-A-Light campaign than did earlier.¹³ (See Figure 3.) Moreover, the increase in these reports from the La Crosse-Eau Claire region is greater than that from the rest of the state.

⁹ Targeted Rating Points is a standard measure of advertising weight, reflecting the number of times a commercial is broadcast and the size of the specified audience (here, adults 25-54 years of age) for the particular venue in which the commercial appears, as determined from regular audience surveys. Each point means that one message should reach one percent of the targeted homes, on average. (The metric does not purport to measure attention, comprehension, etc.)

¹⁰ The region targeted offers a relatively low-cost media market, and one with little spillover into adjacent markets.

¹¹ Using $p < .05$ as the Type I error criterion.

¹² Applying a sign test to the results, the probability of finding all differences in the same direction is less than .05, if the measures can be considered independent of one another.

¹³ It is important to recognize that the other marketing for energy efficiency and CFLs occurred throughout the study period. The most important source was Wisconsin utilities. (For example, the utility in the targeted region sent out a special mailing about the program in August. Retailers also contributed through advertising throughout the state.)

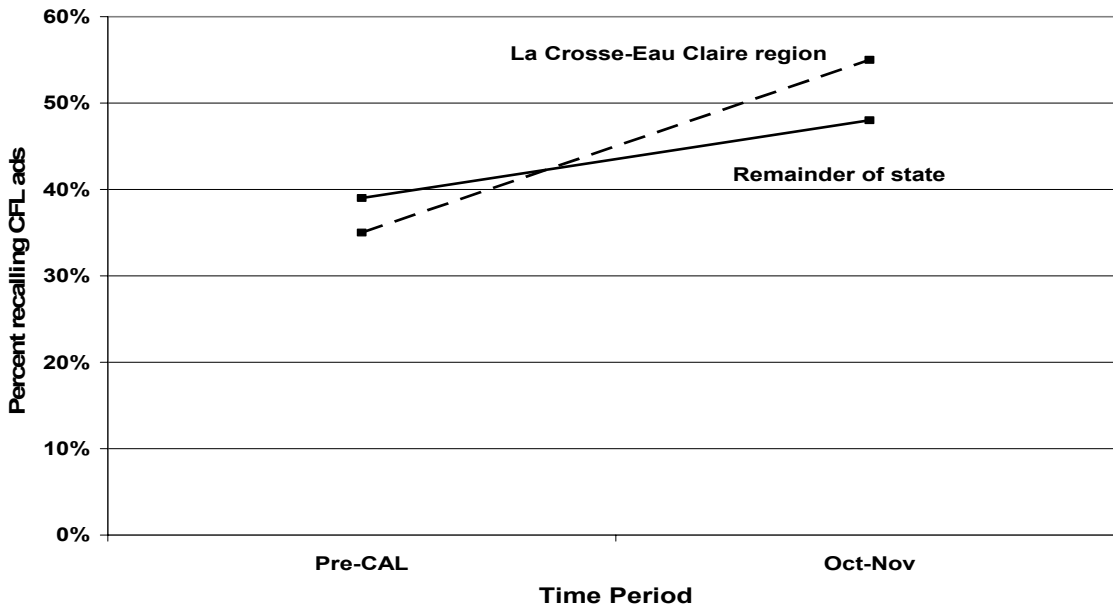


Figure 3. Reported exposure to advertising for CFLs by region, before and during Change-A-Light campaign

Second, differential increases in awareness are consistent with the differences in advertising. Figure 4 shows respondents' awareness of Focus and ENERGY STAR (unprompted and prompted combined) in the La Crosse-Eau Claire region and the remainder of the state before and during the Change-A-Light campaign. Greater growth of awareness of the Focus program occurred in the La Crosse-Eau Claire region than in the remainder of the state. The gap in awareness between the targeted region and the rest of the state closed from twelve percentage points to seven. Awareness of ENERGY STAR also increased in the targeted region, even while it fell slightly (within the margin of statistical error) in the remainder of the state.

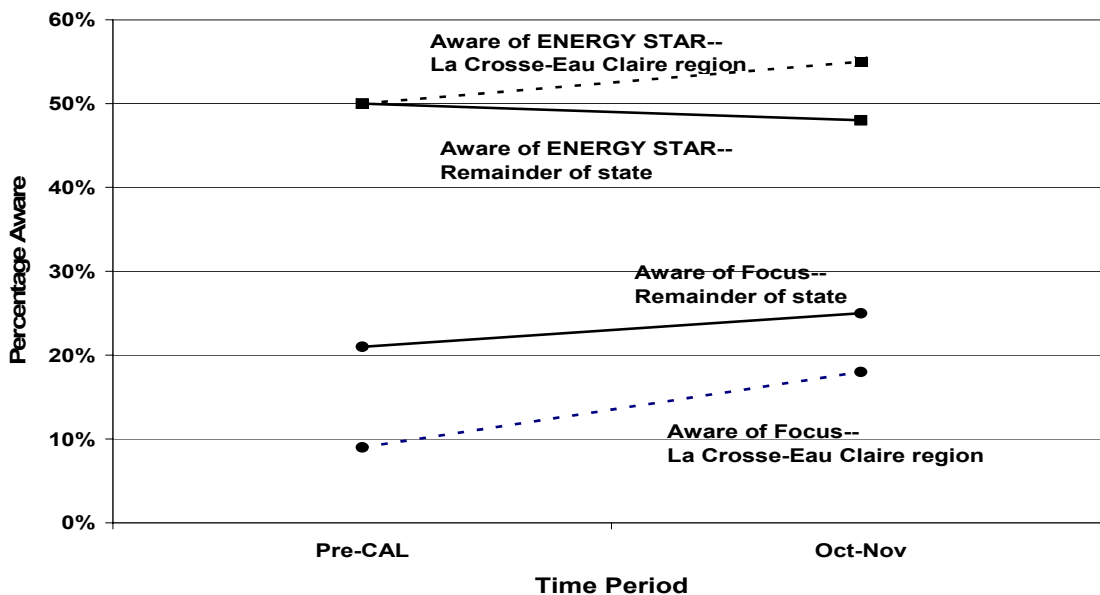


Figure 4. Awareness of Focus and ENERGY STAR by region, before and during Change-A-Light

Of course, the most important potential effect of the advertising is whether it encourages actions that will increase the energy efficiency of the respondents. Here, too, the data suggest that the heavier advertising in the targeted region may have helped increase relevant actions by residential customers there. Figure 5 shows that a greater percentage of respondents reported having purchased CFLs during the Change-a-Light campaign than previously. Moreover, the increase in those reports was somewhat sharper for respondents in the targeted region than for those elsewhere in the state.

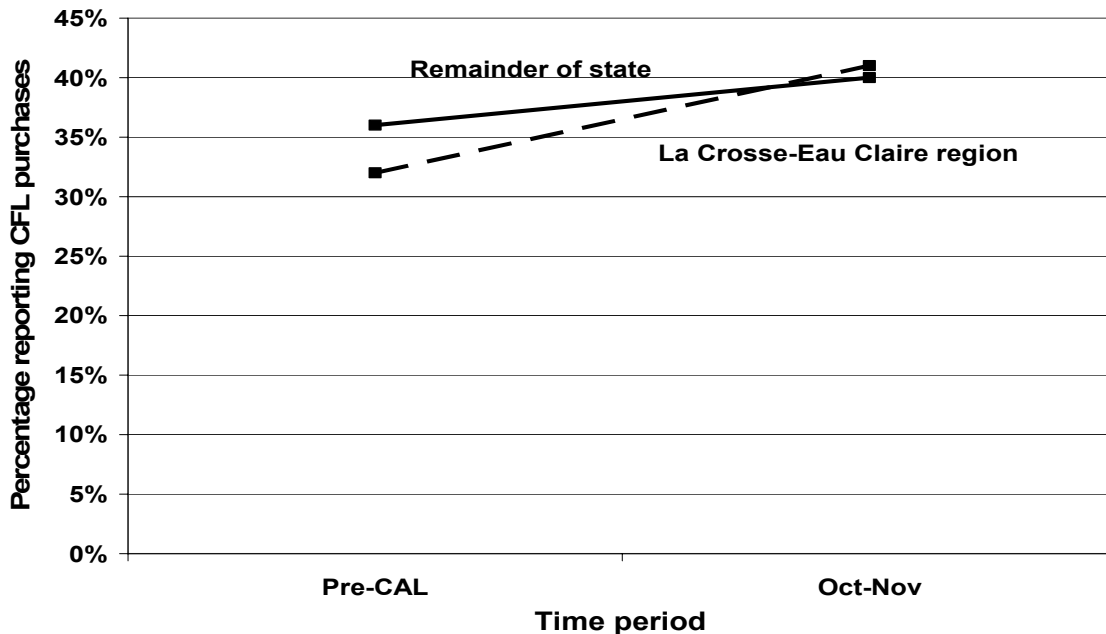


Figure 5. Reported purchases of CFLs, by region, before and during Change-A-Light

Data provided by WECC shows that the increase in reported purchases of CFLs during the Change-A-Light campaign—and the relatively greater increment in the targeted region—were real. Figure 6 shows the number of rebated CFL purchases before the campaign and the number rebated as a result of the promotion. The number sold through the rebate was of course less in the targeted area than in the rest of the state. However, the relative growth in the targeted area was greater, as evidenced by the change in the percentage of all rebates that went to customers of stores in the La Crosse-Eau Claire region. Prior to the campaign, 3.1 percent of the rebates went to customers in the targeted area. In contrast, 11.9 percent of the rebates went to those customers during the campaign.¹⁴

¹⁴ The effects of a separate summer promotion, conducted in conjunction with a large warehouse-type retailer were removed from these analyses.

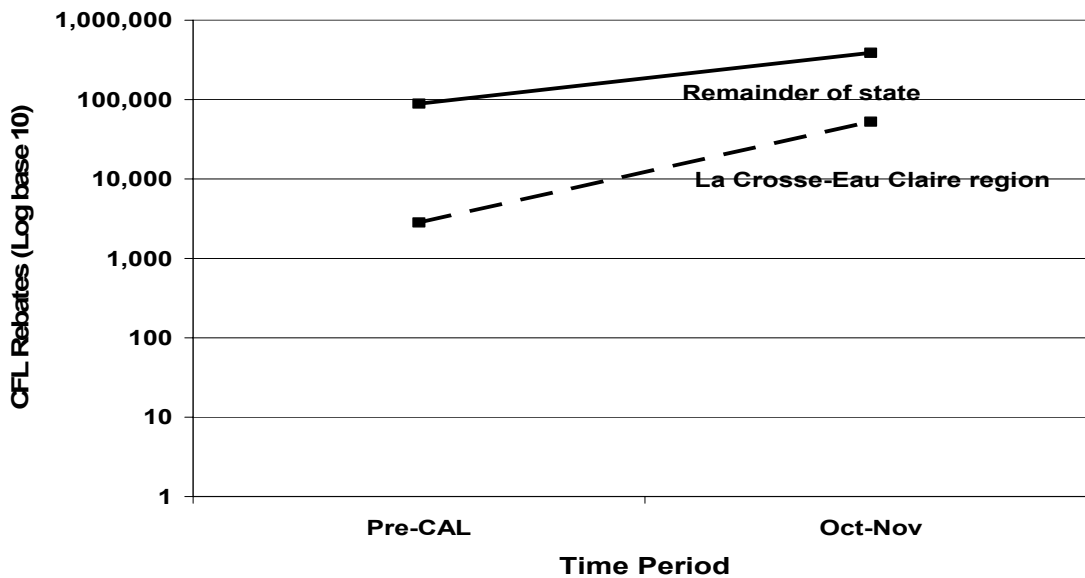


Figure 6. Rebated CFL Sales by region, before and during Change-A-Light campaign

Discussion

The data strongly suggest that the increased marketing effort in the La Crosse-Eau Claire region affected the results in that area more than in the rest of the state. Survey respondents were more likely to recall advertising for CFLs, showed greater growth in their awareness of Focus and ENERGY STAR, and were more likely to report having recently bought CFLs. (Respondents in the targeted region also showed similarly greater effects on the other overall metrics, likelihood of seeking additional information about energy efficiency and likelihood of acting to increase energy efficiency.)¹⁵ Moreover, data on rebates processed show that the growth of (rebated) CFL sales grew relatively faster in the targeted region than elsewhere in the state.

Nonetheless, the individual indicators do not reach conventional levels of statistical significance, thus limiting the conclusions that can be drawn. On the one hand, the availability of the tracking survey provided an important opportunity to test the effectiveness of the increased investment in advertising of the Change-A-Light program in the targeted region. On the other, the sample sizes that fell within the evaluation budget restricted the power of the test. It may be argued that the importance of the issue should have prompted a greater effort to conduct an effective test.

Even if the statistical power had been considerably greater, however, the results of the increased promotion should be considered with care. First, the levels of awareness and other metrics were at a lower level in the targeted region at the outset of the campaign. Growth from a low base is often easier than growth from a moderate base. Second, as noted earlier, other marketing activities did occur both in the targeted region and in the rest of the state before and during the Change-A-Light campaign (particularly, utility brochures and advertising by retailers), although no systematic summary of those efforts or the associated expenditures is available. Third, the advertising effort is only part of the marketing activity that comprised the Change-A-Light promotion. In particular, the promotion was preceded and accompanied by multiple visits to retailers by WECC representatives, who helped with issues of ordering, stocking, labeling, and point-of-sale displays. Among the points that the representatives made during visits was that strong advertising would help drive customers to the stores.

¹⁵ Other indicators, such as web site visits and calls to relevant help lines have not been examined in detail, but also appear to have been affected differentially during the Change-A-Light campaign.

Thus, one effect of the increased advertising may have been indirect: to convince retailers who had not been enthusiastic about the CFL program that stocking and promoting the lamps could increase profit with little risk.¹⁶

In summary, and with some caution, the test of increased advertising in the target region compared to the rest of the state suggests the following lessons learned.

- The targeted advertising effort contributed to the overall success of the Change-A-Light promotion, through
 - Providing program representatives with investments that show retailers the support they require
 - Increasing customer willingness to purchase CFLs
- The advertising also contributed to customer awareness of Focus and ENERGY STAR.
- The existence of the tracking survey was important
 - Providing an opportunity to study the effects of the targeting and increased spending without undue delays for design, approval, and implementation
 - But requiring additional resources both to ensure statistical power and to follow up on relevant issues of attribution and causality

Summary and Conclusions

The sponsors of the Focus program and their marketing coordinator developed an ambitious umbrella advertising plan and sought to obtain continuing feedback on relevant metrics of success. Although some evidence of movement on the metrics was observed, external circumstances dictated reductions in the marketing inputs required, thereby eliminating the opportunity to complete an appropriate test of the campaign and the program theory on which it was based. Nonetheless, the availability of the tracking survey established to monitor campaign effects proved useful in assessing the results of differential advertising weights for one element of the Focus portfolio.

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¹⁶ These comments are based on qualitative discussions with WECC and with retailers earlier in the program.

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