

STATEMENT OF CONFIDENTIALITY AND OWNERSHIP

All of the analyses, findings and recommendations contained within this report are the exclusive property of Northeast Gas Association.

As required by the Code of Ethics of the National Council on Public Polls and the United States Privacy Act of 1974, GreatBlue Research maintains the anonymity of respondents to surveys the firm conducts. No information will be released that might, in any way, reveal the identity of the respondent.

Moreover, no information regarding these findings will be released without the written consent of an authorized representative of Northeast Gas Association.

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INTRODUCTION

GreatBlue Research, Inc. (GreatBlue) is pleased to present the composite results of a *2013 Pipeline Media Ad Campaign Evaluations Study* conducted on behalf of members of the Northeast Gas Association. The study included a comprehensive survey among 538 General Public respondents all within the service territories of the participating NGA member companies.

The study was designed to measure the awareness of natural gas pipeline safety, emergency response, and damage prevention radio and television messages among affected public (customers and non-customers) throughout the NGA service territory. The Post-test survey was specifically designed to measure the movement in awareness after a four (4) week advertisement campaign conducted by members of the Northeast Gas Association.

All interviews were conducted within the towns served by participating NGA member companies. GreatBlue, working together with NGA officials, designed the survey instruments to be used when interviewing respondents.

The survey instruments employed in the *2013 Pipeline Media Ad Campaign Evaluations Study* included the following areas of investigation:

- Exposure to paid advertising campaigns and specific ads;
- Ad effects (initial response, action tendencies, awareness/perception change);
- Awareness of natural gas pipelines in the area;
- Awareness of natural gas leak detection; and
- Demographics.

Section II of this report discusses the Methodology used in the study, while Section III includes highlights based on an analysis of the findings. Section IV is a Summary of Findings for the telephone surveys - a narrative account of the data.

Section V is an Appendix to the report containing a copy of the survey instrument utilized and the composite aggregate data for each study (post).

METHODOLOGY

Using a quantitative research design, GreatBlue completed 538 interviews among residents living within the towns served by participating NGA member companies. Residents were both customers and non-customers residing within the towns served by participating NGA member companies.

Survey design at GreatBlue is a careful, deliberative process to ensure fair, objective and balanced surveys. Staff members, with years of survey design experience, edit out any bias. Further, all scales used by GreatBlue (either numeric, such as one through ten, or wording such as strongly agree, somewhat agree, somewhat disagree or strongly disagree) are balanced evenly. And, placement of questions is carefully accomplished so that order has minimal impact.

All population-based surveys conducted by GreatBlue are proportional to population contributions within states, towns, and known census tract, group blocks and blocks. This distribution ensures truly representative results without significant under or over representation of various geographic or demographic groups within a sampling frame. While the final sample was proportionally distributed among each of the participating companies, GreatBlue provide a minimum of 25 completed surveys for each company to allow for individual analysis and comparison.

GreatBlue utilized a “super random digit” sampling procedure for residential interviews, which derives a working telephone sample of both listed and unlisted telephone numbers. This method of sample selection eliminates any bias towards only listed telephone numbers. Additionally, this process allows randomization of numbers, which equalizes the probability of qualified respondents being included in the sampling frame.

The survey instrument was used to elicit information from all respondents. Residents qualified for the survey if they confirmed being one of the heads of household, at least eighteen years of age and were current residents of the service territories included. Telephone researchers were trained on all survey instruments and a pre-test was conducted before full fielding began.

All facets of the study were completed by GreatBlue’s senior staff and researchers. These aspects included: survey design, pre-test, computer programming, fielding, coding, editing, data analysis, verification, validation and logic checks, analysis and report writing.

Statistically, a sample of 538 surveys represents a margin for error of +/-4.2% at a 95% confidence level. In theory, a sample of NGA participating member residents (in each specified region) will differ no more than +/-4.2% than if all residents were contacted and included in the survey. That is, if random probability sampling procedures were reiterated over and over again, sample results may be expected to approximate the larger population values within plus or minus 4.2% -- 95 out of 100 times.

Readers of this report should note that any survey is analogous to a snapshot in time and results are only reflective of the time period in which the survey was undertaken. Should additional concerted public relations or information campaigns be undertaken during or shortly after the fielding of the survey, the results contained herein may be expected to change and should be, therefore, carefully interpreted and extrapolated.

Furthermore, it is important to note that all surveys contain some component of “sampling error.” Error that is attributed to systematic bias has been significantly reduced by utilizing strict random probability procedures. This sample was strictly random in that selection of each potential respondent was an independent event, based on known probabilities.

Each qualified household within the service territory of participating NGA members had an equal chance for participating in the study. Statistical random error, however, can never be eliminated but may be significantly reduced by increasing sample size.

HIGHLIGHTS

ON AWARENESS

- In the 2013 post-test, the percentage of Consolidated Edison respondents (72.3%) who reported to be “very aware” (61.5%) or “somewhat aware” (10.8%) of natural gas pipelines running underground in areas of the community remained consistent with what was recorded in 2012 (70.7%). Other respondents reported to be “somewhat unaware” (3.4% to 7.7%), “not at all aware” (20.7% to 16.9%) or “unsure” (5.2% to 3.1%).
- A consistent percentage of 2013 post-test respondents (70.8% from 69.0% in 2012) reported to be “very familiar” (50.8%) or “somewhat familiar” (20.0%) with the smell of natural gas.

ON KNOWLEDGE/UNDERSTANDING

- A majority of 2013 Consolidated Edison respondents (86.2% in the 2013 post-test up from 77.6% in 2012) correctly reported they could detect a natural gas leak by smell. However, 9.2% of respondents reported “don’t know/unsure,” followed by “other” (6.2%) and “hear a gas leak” (3.1%).

ON BEHAVIOR

- If a natural gas leak were detected, the most frequently reported courses of action were “call 911” (49.2% from 32.8% in the 2012 post-test), “call local natural gas company or pipeline operator” (40.0% from 31.0% in 2012) or “move to a safe area” (16.9% from 15.5% in 2012).

ON THE SAFETY CAMPAIGN

- Only one-fifth of all Consolidated Edison respondents (21.5%) indicated having read, seen or heard something, in general, about natural gas pipeline safety over the last year. This marks an increase from 12.1% in 2012 respondents reporting the same.

ON THE APRIL-MAY 2013 PIPELINE MEDIA AD CAMPAIGN

- More than one-tenth of 2013 post-test respondents (13.8%) indicated having recently read, seen or heard advertisements sponsored by Consolidated Edison regarding natural gas pipeline safety. This remains consistent with 15.5% who reported the same in 2012.

SUMMARY OF FINDINGS

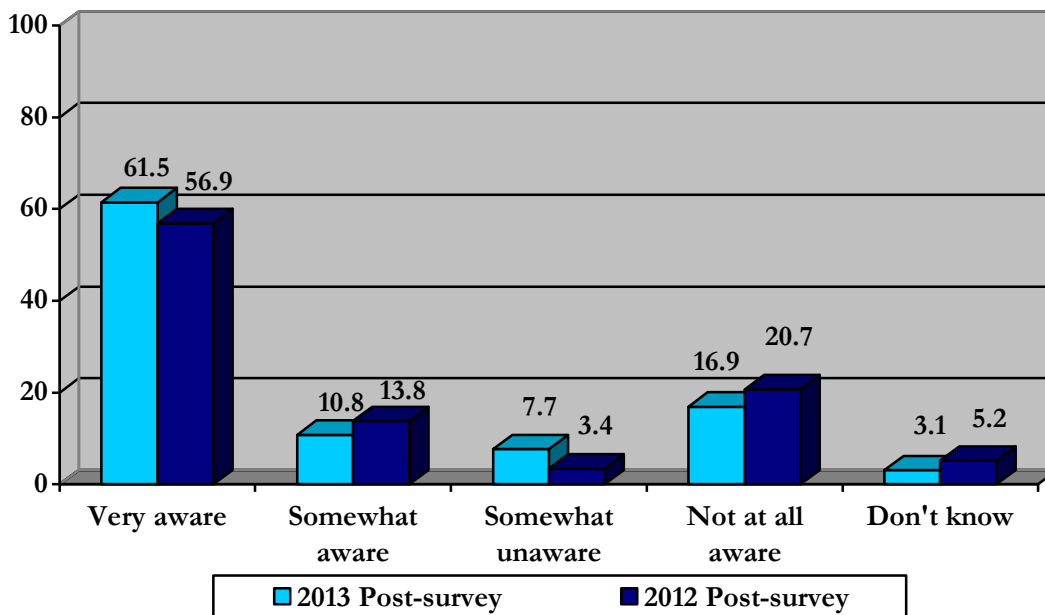
Readers are reminded the following section summarizes statistics collected from two (2) surveys conducted among 58 respondents in 2012 and 65 respondents in 2013 living within towns served by **Consolidated Edison**.

AWARENESS

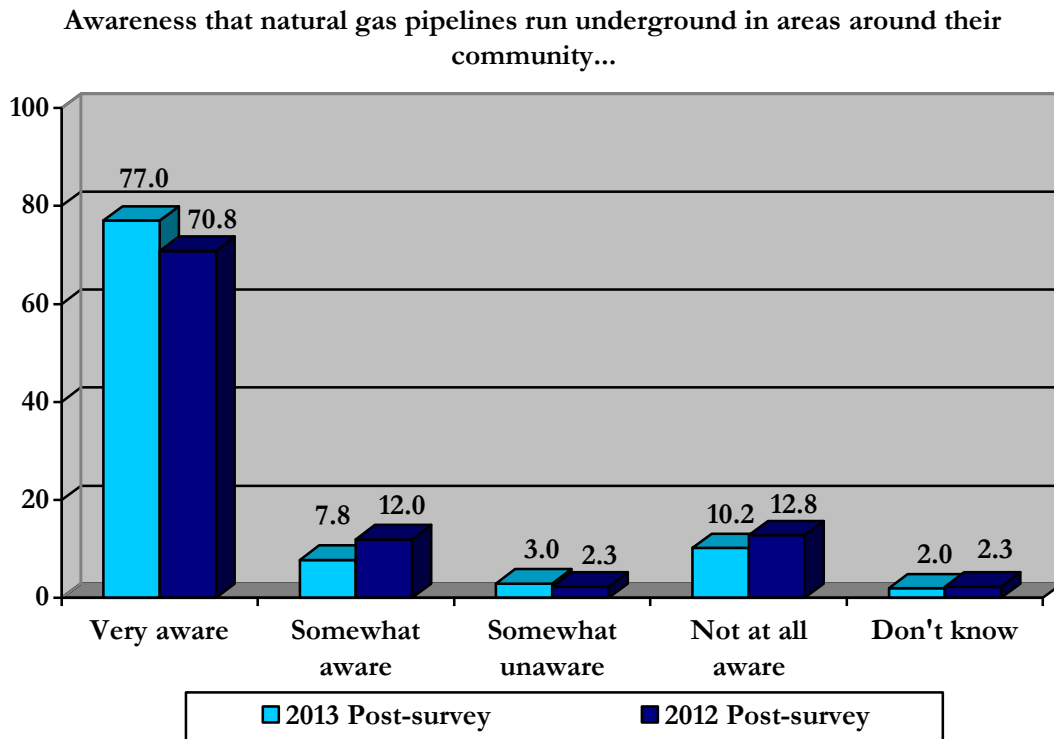
For purposes of the study, respondents were first read a statement indicating the term “pipeline” referred to either a transmission line, a main line running down a street or a service line to a home.

Close to three-quarter of 2013 post-test respondents (customers and non-customers) within Consolidated Edison’s service territory, 72.3%, suggested they were either “very aware” (61.5%) or “somewhat aware” (10.8%) that natural gas pipelines run underground in many areas in and around their community, including directly to the homes of natural gas customers. Others reported they were either “somewhat unaware” (7.7%), “not at all aware” (16.9%) or were “unsure” (3.1%).

Awareness that natural gas pipelines run underground in areas around their community... (Consolidated Edison)



The following chart presents composite data for all NGA companies participating in the study.



Similarly, over one-third of 2013 post-test respondents, 70.8%, indicated they were either “very familiar” (50.8%) or “somewhat familiar” (20.0%) with the smell of natural gas. This remains consistent with the 69.0% of 2012 post-test respondents who reported the same.

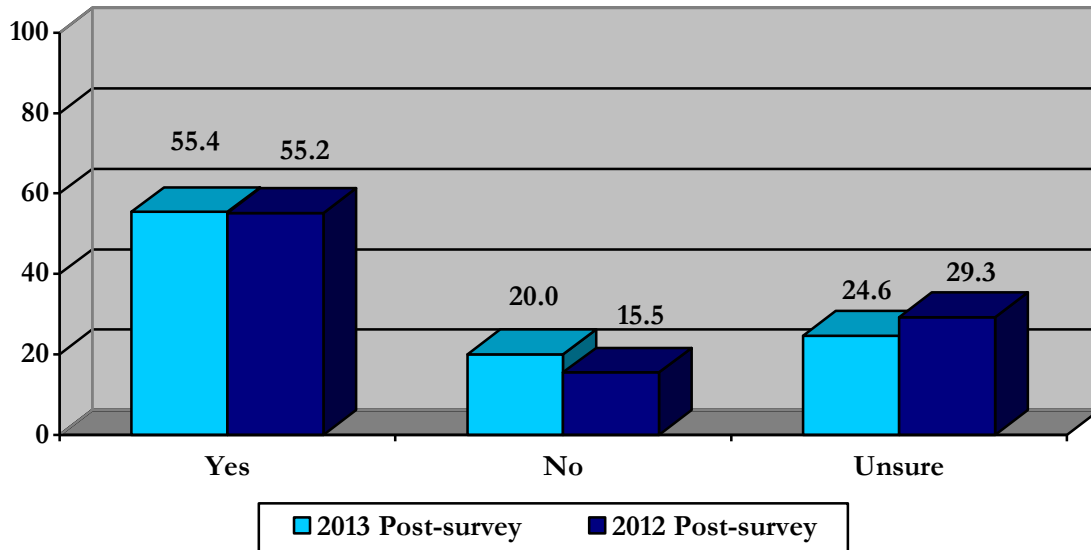
<i>How familiar with the smell of natural gas? (Consolidated Edison)</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Very familiar	50.8%	46.6	4.2
Somewhat familiar	20.0	22.4	2.4
Somewhat unfamiliar	3.1	---	3.1
Not at all familiar	24.6	31.0	6.4
Don't know/unsure	1.5	---	1.5
<i>Total familiar</i>	<i>70.8</i>	<i>69.0</i>	<i>1.8</i>
<i>Total unfamiliar</i>	<i>27.7</i>	<i>31.0</i>	<i>3.3</i>

<i>How familiar with the smell of natural gas?</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Very familiar	70.3%	61.3	9.0
Somewhat familiar	16.2	17.3	1.1
Somewhat unfamiliar	1.9	3.5	1.6
Not at all familiar	11.2	17.5	6.3
Don't know/unsure	0.6	0.5	0.1
<i>Total familiar</i>	<i>86.5</i>	<i>78.6</i>	<i>7.9</i>
<i>Total unfamiliar</i>	<i>13.1</i>	<i>21.5</i>	<i>8.4</i>

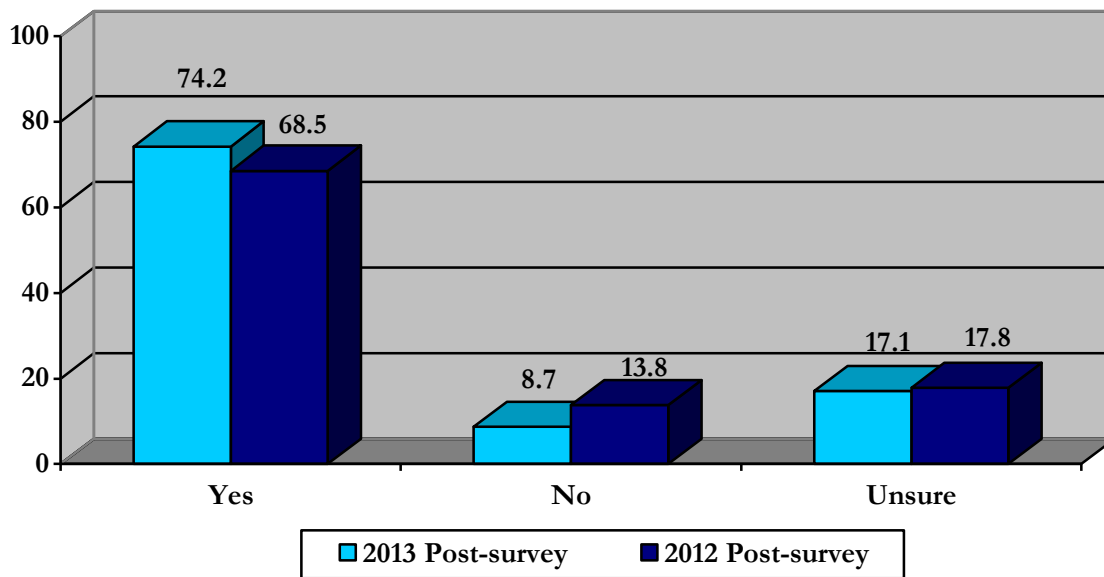
Following, all respondents were simply asked if a natural gas pipeline runs through their town.

More than half of 2013 post-test respondents, 55.4%, reported there was a natural gas pipeline that ran through their town. This remains consistent with 55.2% reporting the same in the 2012 post-test.

Does a natural gas pipeline run through your town?(Consolidated Edison)



Does a natural gas pipeline run through your town?



KNOWLEDGE/UNDERSTANDING

Researchers asked all respondents, in an open-ended format question, how they might detect a natural gas leak.

The following table presents the results as collected. Readers should note that multiple responses were collected.

<i>How might you detect a natural gas leak? (Consolidated Edison)</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Correct: Smell gas leak	86.2%	77.6	8.6
Correct: See damaged gas pipe or line	---	---	---
Correct: Hear gas leak	3.1	3.4	0.3
Correct: See effects of a natural gas leak	---	---	---
Incorrect: See natural gas (no description)	---	---	---
Other	6.2	8.5	2.3
Don't know/unsure	9.2	17.2	8.0

“Other” responses included “alerted by detector.”

<i>How might you detect a natural gas leak?</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Correct: Smell gas leak	90.3%	83.0	7.3
Correct: See damaged gas pipe or line	1.9	3.3	1.4
Correct: Hear gas leak	3.9	1.0	2.9
Correct: See effects of a natural gas leak	0.7	1.0	0.3
Incorrect: See natural gas (no description)	0.4	0.5	0.1
Other	2.2	5.3	3.1
Don't know/unsure	7.2	13.3	6.1

If respondents were to detect a natural gas leak, the following table depicts the action they would most likely take. Readers should note that multiple responses were collected.

<i>If you did detect a natural gas leak, what would you do? (Consolidated Edison)</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Call 911	49.2%	32.8	16.4
Call local natural gas company or pipeline operator	40.0	31.0	9.0
Move to a safe area	16.9	15.5	1.4
Leave house	13.8	10.3	3.5
Call local phone number for police/fire/emergency services	9.2	25.9	16.7
Other	7.7	34.4	26.7
Don't know/unsure	3.1	3.4	0.3
Look on web/internet for phone number	---	---	---

“Other” responses included “turn off gas” and “call landlord/property manager.”

<i>If you did detect a natural gas leak, what would you do?</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Call local natural gas company or pipeline operator	50.2%	49.3	0.9
Call 911	41.1	31.3	9.8
Move to a safe area	19.5	13.0	6.5
Leave house	16.0	17.0	1.0
Call local phone number for police/fire/emergency services	7.4	19.0	11.6
Other	6.3	17.9	11.6
Don't know/unsure	2.4	2.5	0.1
Look on web/internet for phone number	0.2	---	0.2

THE SAFETY CAMPAIGN

One-fifth of 2013 post-test respondents, 21.5%, indicated having read, seen or heard something, in general, about natural gas pipeline safety over the last year. This marks an increase from 12.1% of 2012 post-test respondents reporting the same.

<i>Read, seen or heard any natural gas pipeline safety information over the last year? (Consolidated Edison)</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Yes	21.5%	12.1	9.4
No	76.9	87.9	11.0
Don't know/unsure	1.5	---	1.5

<i>Read, seen or heard any natural gas pipeline safety information over the last year?</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Yes	19.5%	19.3	0.2
No	78.6	79.3	0.7
Don't know/unsure	1.9	1.5	0.4

Respondents were asked to name the key education messages regarding pipeline safety education information they have read, seen or heard. Each message recalled, along with frequency of mention, is presented in the table below. Readers should note that multiple responses were accepted.

<i>Messages recalled... (Consolidated Edison)</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
"Call before you dig"	28.6%	14.3	14.3
Don't know/unsure/don't recall	28.6	42.9	14.3
If you smell rotten eggs, take precautions and call the gas leak hotline from a neighbor's home	21.4	---	21.4
Safety is priority number one	7.1	---	7.1
Excavators cause damage by digging	7.1	---	7.1
Property owners should report suspicious activity	7.1	---	7.1
Call the police if you see anyone damaging pipelines	7.1	---	7.1
Pipeline markers indicate pipe locations	7.1	---	7.1
It's illegal to dig on your property without markout	---	---	---
Maintain access to gas meters	---	---	---
Dig safely or Dig Safe	---	---	---
Wait for "markout"	---	---	---
Markouts are done by <u>(Local Company or Gas Transmission Company)</u> at no cost	---	---	---
Mercaptan, a special odorant is added to natural gas	---	---	---
Move to a safe environment	---	---	---
Do not strike a match/turn lights on or off	---	---	---
Remain in a safe area but nearby while waiting for help	---	14.3	14.3
Call 811	---	---	---
Other	---	28.6	28.6

The following chart presents composite data for all NGA companies participating in the study.

<i>Messages recalled...</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
"Call before you dig"	57.1%	22.1	35.0
Don't know/unsure/don't recall	21.9	33.8	11.9
Dig safely or Dig Safe	11.4	9.1	2.3
Safety is priority number one	9.5	7.8	1.7
If you smell rotten eggs, take precautions and call the gas leak hotline from a neighbor's home	8.6	9.1	0.5
Call 811	5.7	2.6	3.1
It's illegal to dig on your property without markout	2.9	1.3	1.6
Excavators cause damage by digging	1.9	---	1.9
Call the police if you see anyone damaging pipelines	1.9	1.3	0.6
Move to a safe environment	1.9	1.3	0.6
Property owners should report suspicious activity	1.0	---	1.0
Wait for "markout"	1.0	1.3	0.3
Markouts are done by (Local Company or Gas Transmission Company) at no cost	1.0	1.3	0.3
Do not strike a match/turn lights on or off	1.0	1.3	0.3
Pipeline markers indicate pipe locations	1.0	---	1.0
Maintain access to gas meters	---	---	---
Mercaptan, a special odorant is added to natural gas	---	---	---
Remain in a safe area but nearby while waiting for help	---	5.2	5.2
Other	---	10.4	10.4

A smaller number of respondents, 92.3% on the 2013 post-test compared to 96.6% on the 2012 post-test, noted pipeline safety public education is either “very important” or “somewhat important.”

<i>How important is pipeline safety public education? (Consolidated Edison)</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Very important	76.9%	82.8	5.9
Somewhat important	15.4	13.8	1.6
Somewhat unimportant	1.5	---	1.5
Not at all important	---	1.7	1.7
Don't know/unsure	6.2	1.7	1.7
<i>Total important</i>	<i>92.3</i>	<i>96.6</i>	<i>4.3</i>
<i>Total unimportant</i>	<i>1.5</i>	<i>1.7</i>	<i>0.2</i>

<i>How important is pipeline safety public education?</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Very important	77.9%	77.3	0.6
Somewhat important	17.8	18.8	1.0
Somewhat unimportant	0.7	1.0	0.3
Not at all important	1.5	1.5	---
Don't know/unsure	2.0	1.5	0.5
<i>Total important</i>	<i>95.7</i>	<i>96.0</i>	<i>0.3</i>
<i>Total unimportant</i>	<i>2.2</i>	<i>2.5</i>	<i>0.3</i>

All respondents were asked how familiar they were with the following terms or actions related to pipeline safety.

The table below presents each of the terms measured, as well as the cumulative total for those providing a “very familiar” or “somewhat familiar” response.

<i>How familiar with the following terms? (Consolidated Edison)</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Dig Safe/Dig Safely/Dig Net/Call Before You Dig	35.4%	32.8	2.6
811 – Call Before You Dig	20.0	15.5	4.5

<i>How familiar with the following terms?</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Dig Safe/Dig Safely/Dig Net/Call Before You Dig	74.3%	63.5	10.8
811 – Call Before You Dig	49.3	37.0	12.3

APRIL-MAY 2013 MESSAGES

More than one-tenth of 2013 post-test respondents (13.8%) indicated having read, heard, or seen any advertisements sponsored by their local natural gas company, gas transmission companies and the Northeast Gas Association informing residents about natural gas pipeline safety, remaining consistent with 15.5% in 2012 who reported the same.

<i>Have you read, heard, or seen any advertising sponsored by your local natural gas company, gas transmission companies and the Northeast Gas Association informing residents about natural gas pipeline safety? (<u>Consolidated Edison</u>)</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Yes	13.8%	15.5	1.7
No	78.5	79.3	0.8
Don't know/unsure	7.7	5.2	2.5

<i>Have you read, heard, or seen any advertising sponsored by your local natural gas company, gas transmission companies and the Northeast Gas Association informing residents about natural gas pipeline safety?</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Yes	21.4%	21.0	0.4
No	76.2	73.8	2.4
Don't know/unsure	2.4	5.3	2.9

Following, those respondents who reported either reading, hearing or seeing any advertisements from their local natural gas company, gas transmission companies and the Northeast Gas Association were asked to indicate the message or recall what the advertisement said.

The following table presents the results as collected. Readers should note that multiple responses were accepted.

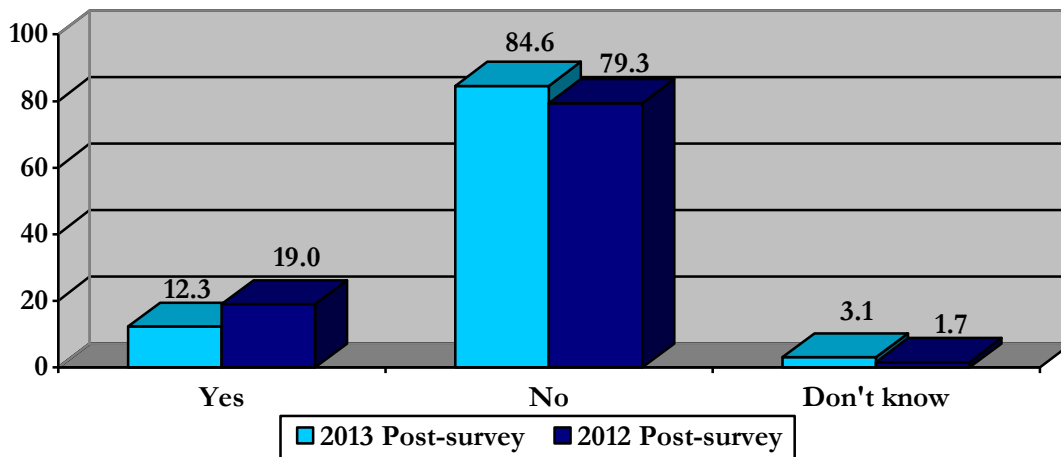
<i>What was the message or what do you recall the ads saying? (Consolidated Edison)</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Have Leak (i.e. “how to detect a leak,” “call 911 or local operator in event of a leak” or “leave area immediately”)	11.1%	22.2	11.1
Right of way (“long stretch of grass marked by signs,” “do not dig in right of way” or “get pipeline operators approval”)	11.1	---	11.1
Call Before You Dig (i.e. “call 811,” “have buried utilities marked for free before you dig” or “there may be pipelines buried under ground”)	44.4	44.4	---
Other	---	11.1	11.1
Don’t know/unsure	33.3	22.2	11.1

<i>What was the message or what do you recall the ads saying?</i>	<i>2013 Post-survey</i>	<i>2012 Post-survey</i>	<i>Change</i>
Have Leak (i.e. “how to detect a leak,” “call 911 or local operator in event of a leak” or “leave area immediately”)	23.5%	23.5	---
Right of way (“long stretch of grass marked by signs,” “do not dig in right of way” or “get pipeline operators approval”)	5.2	5.9	0.7
Call Before You Dig (i.e. “call 811,” “have buried utilities marked for free before you dig” or “there may be pipelines buried under ground”)	67.0	48.2	18.8
Other	---	8.4	8.4
Don’t know/unsure	14.8	25.9	11.1

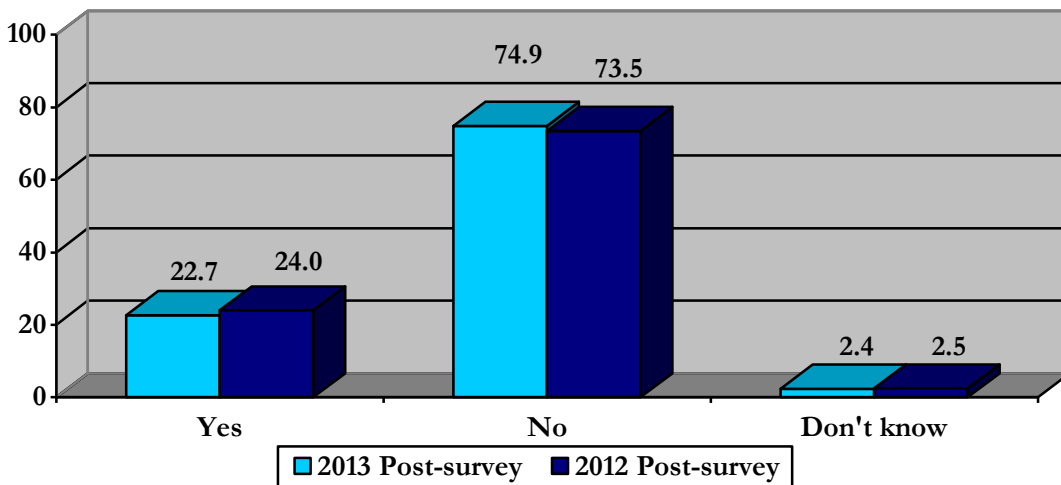
All respondents were asked to indicate whether they recalled a message instructing them to leave the area immediately and call 911 or the pipeline company if they detected a natural gas leak.

As presented in the following chart, a slightly smaller number of 2013 post-test respondents, 12.3%, reported recalling a message instructing them to leave the area immediately and call 911 or the pipeline company if they detected a natural gas leak, compared to 19.0% of 2012 post-test respondents reporting the same.

Do you recall a message instructing you to leave the area immediately and call 911 or the pipeline company if you detect a gas leak? (Consolidated Edison)



Do you recall a message instructing you to leave the area immediately and call 911 or the pipeline company if you detect a gas leak?



Those respondents who recalled a message instructing them to leave the area immediately and call 911 or the pipeline company if they detected a gas leak were asked to indicate where they read, heard or saw this advertisement.

The following table presents the results as collected.

<i>Do you recall where you read, heard, or saw this advertisement sponsored by your local natural gas company, gas transmission companies and the Northeast Gas Association? (Consolidated Edison)</i>	<i>2013 Post-survey (N=8)</i>	<i>2012 Post-survey (N=11)</i>	<i>Change</i>
Television	50.0%	18.2	31.8
Print	37.5	36.4	1.1
Don't know/unsure	12.5	9.1	3.4
Other	---	27.3	27.3
Web/internet	---	9.1	9.1
Radio	---	---	---

<i>Do you recall where you read, heard, or saw this advertisement sponsored by your local natural gas company, gas transmission companies and the Northeast Gas Association?</i>	<i>2013 Post-survey (N=122)</i>	<i>2012 Post-survey (N=96)</i>	<i>Change</i>
Print	41.0%	30.2	10.8
Television	39.3	32.3	7.0
Don't know/unsure	8.2	14.6	6.4
Radio	7.4	3.1	4.3
Other	3.3	11.4	8.1
Web/internet	0.8	8.3	7.5

Those respondents recalling the message were asked to rate the message they recalled on several important characteristics using a scale of one to ten where one (01) meant “very good” and ten (10) meant “very poor.” Readers should note “don’t know” responses have been removed from the data.

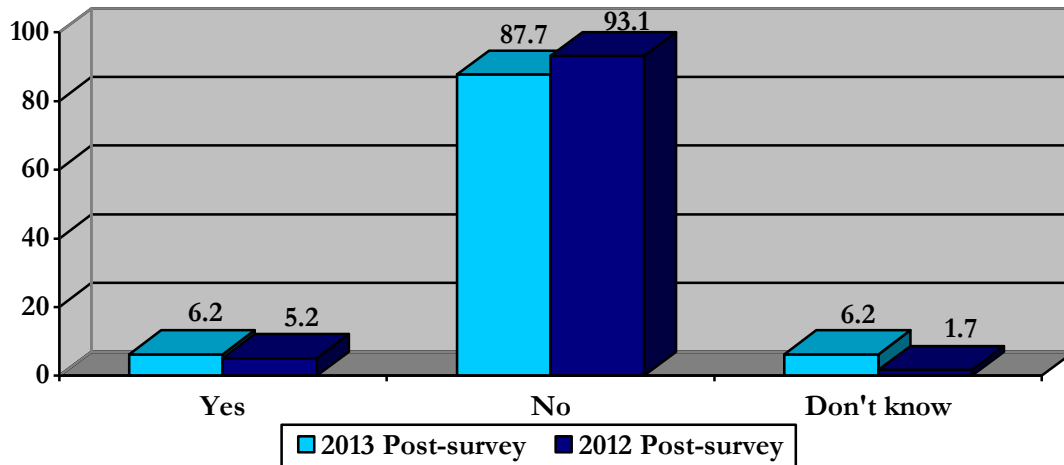
<i>Characteristics... (Consolidated Edison)</i>	<i>2013 Post-survey</i>			<i>2012 Post-survey</i>		
	<i>Total good</i>	<i>Total neutral</i>	<i>Total poor</i>	<i>Total good</i>	<i>Total neutral</i>	<i>Total poor</i>
Attention grabbing	85.7%	---	14.3	71.4	28.6	---
Providing specific instructions for natural gas emergencies	100.0	---	---	85.7	---	14.3
Increasing your knowledge about pipeline safety	100.0	---	---	75.0	12.5	12.5

<i>Characteristics...</i>	<i>2013 Post-survey</i>			<i>2012 Post-survey</i>		
	<i>Total good</i>	<i>Total neutral</i>	<i>Total poor</i>	<i>Total good</i>	<i>Total neutral</i>	<i>Total poor</i>
Attention grabbing	80.4%	12.5	7.1	72.9	17.1	10.0
Providing specific instructions for natural gas emergencies	85.3	9.2	5.5	80.0	8.6	11.4
Increasing your knowledge about pipeline safety	86.4	10.0	3.6	72.2	9.7	18.1

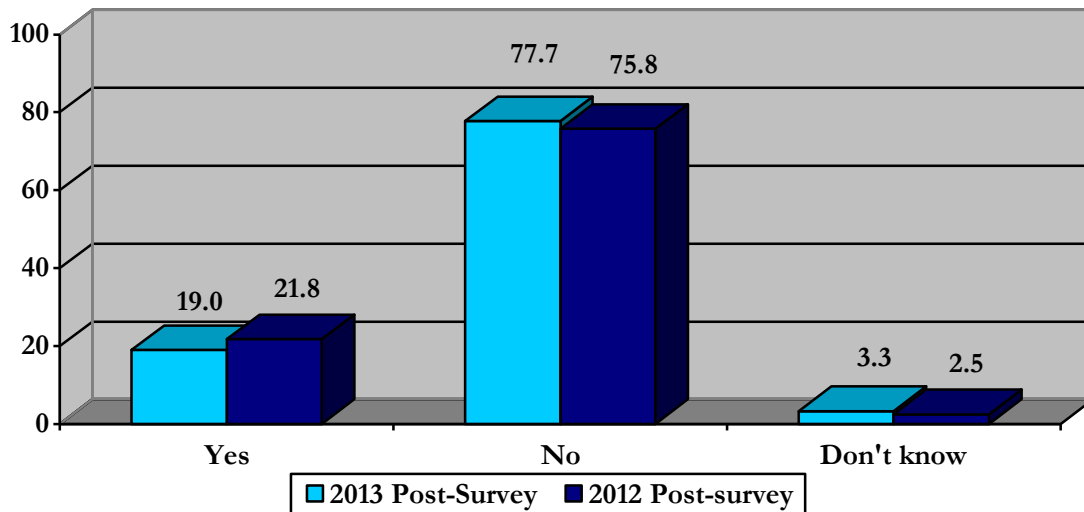
All respondents were asked to indicate whether they recalled a message instructing them to call 811 to have buried utilities marked for free before they dig.

As presented in the following chart, 6.2% of 2013 post-test respondents reported recalling a message instructing them to call 811 to have buried utilities marked for free before they dig, remaining consistent with 5.2% who reported the same in 2012.

Do you recall a message instructing you to call 811 to have buried utilities marked for free before you dig? (Consolidated Edison)



Do you recall a message instructing you to call 811 to have buried utilities marked for free before you dig?



Those respondents who recalled a message instructing them to call 811 to have buried utilities marked for free before they dig were asked to indicate where they read, heard or saw this advertisement.

The following table presents the results as collected.

<i>Do you recall where you read, heard, or saw this advertisement sponsored by your local natural gas company, gas transmission companies and the Northeast Gas Association? (Consolidated Edison)</i>	<i>2013 Post-survey (N=4)</i>	<i>2012 Post-survey (N=3)</i>	<i>Change</i>
Print	75.0%	---	75.0
Television	25.0	33.3	8.3
Other	---	---	---
Don't know/unsure	---	33.3	33.3
Radio	---	33.3	33.3
Web/internet	---	---	---

<i>Do you recall where you read, heard, or saw this advertisement sponsored by your local natural gas company, gas transmission companies and the Northeast Gas Association?</i>	<i>2013 Post-survey (N=102)</i>	<i>2012 Post-survey (N=87)</i>	<i>Change</i>
Television	40.2%	36.8	3.4
Print	37.3	28.7	8.6
Radio	7.8	8.0	0.2
Other	6.9	13.6	6.7
Don't know/unsure	6.9	11.5	4.6
Web/internet	1.0	2.3	1.3

Those respondents recalling the message were asked to rate the message they recalled on several important characteristics using a scale of one to ten where one (01) meant “very good” and ten (10) meant “very poor.” Readers should note “don’t know” responses have been removed from the data.

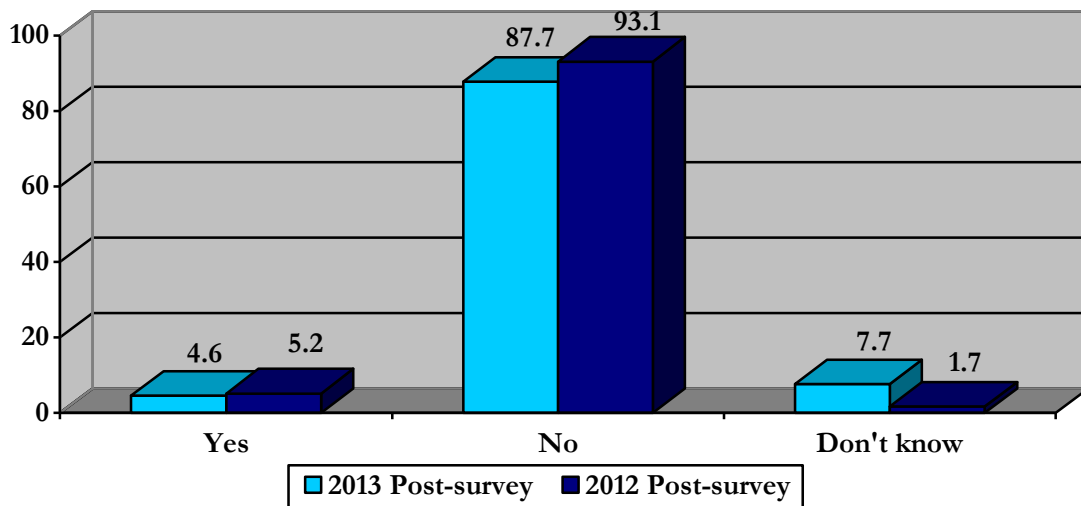
<i>Characteristics... (Consolidated Edison)</i>	<i>2013 Post-survey</i>			<i>2012 Post-survey</i>		
	<i>Total good</i>	<i>Total neutral</i>	<i>Total poor</i>	<i>Total good</i>	<i>Total neutral</i>	<i>Total poor</i>
Attention grabbing	100.0%	---	---	50.0	---	50.0
Providing specific instructions for natural gas emergencies	100.0	---	---	---	---	100.0
Increasing your knowledge about pipeline safety	100.0	---	---	50.0	---	50.0

<i>Characteristics...</i>	<i>2013 Post-survey</i>			<i>2012 Post-survey</i>		
	<i>Total good</i>	<i>Total neutral</i>	<i>Total poor</i>	<i>Total good</i>	<i>Total neutral</i>	<i>Total poor</i>
Attention grabbing	84.0%	11.7	4.3	75.0	10.3	14.7
Providing specific instructions for natural gas emergencies	85.9	7.6	6.5	80.0	10.8	9.2
Increasing your knowledge about pipeline safety	86.0	8.6	5.4	76.1	9.0	14.9

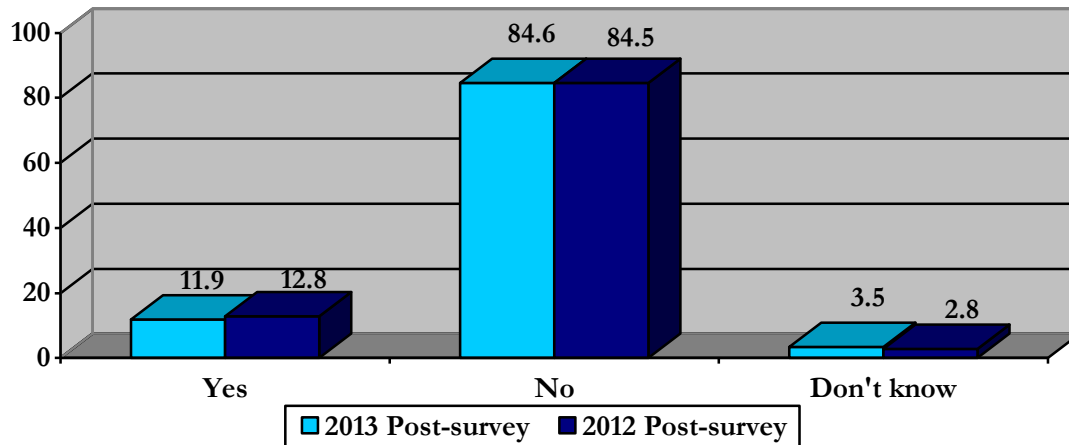
All respondents were asked to indicate whether they recalled a message regarding a long wide stretch of grass cleared of trees and marked with signs called a “right of way” and not to plant, dig or build on it.

As presented in the following chart, a small number of 2013 respondents, 4.6%, reported recalling a message regarding a long wide stretch of grass cleared of trees and marked with signs called a “right of way” and not to plant, dig or build on it. This remains consistent with 5.2% who reported the same in 2012.

Do you recall a message regarding a long wide stretch of grass cleared of trees and marked with signs called a “right of way” and not to plant, dig or build on it? (Consolidated Edison)



Do you recall a message regarding a long wide stretch of grass cleared of trees and marked with signs called a “right of way” and not to plant, dig or build on it?



Those respondents who recalled a message regarding a long wide stretch of grass cleared of trees and marked with signs called a “right of way” and not to plant, dig or build on it were asked to indicate where they read, heard or saw this advertisement.

The following table presents the results as collected.

<i>Do you recall where you read, heard, or saw this advertisement sponsored by your local natural gas company, gas transmission companies and the Northeast Gas Association? (Consolidated Edison)</i>	<i>2013 Post-survey (N=3)</i>	<i>2012 Post-survey (N=3)</i>	<i>Change</i>
Television	33.3%	66.7	33.4
Print	33.3	33.3	---
Other	33.3	---	33.3
Don't know/unsure	---	---	---
Radio	---	---	---
Web/internet	---	---	---

“Other” responses included “word of mouth.”

<i>Do you recall where you read, heard, or saw this advertisement sponsored by your local natural gas company, gas transmission companies and the Northeast Gas Association?</i>	<i>2013 Post-survey (N=64)</i>	<i>2012 Post-survey (N=51)</i>	<i>Change</i>
Print	43.8%	25.5	18.3
Television	29.7	35.3	5.6
Other	11.0	25.4	14.4
Radio	7.8	3.9	3.9
Don't know/unsure	6.3	9.8	3.5
Web/internet	1.6	---	1.6

Those respondents recalling the message were asked to rate the message they recalled on several important characteristics using a scale of one to ten where one (01) meant “very good” and ten (10) meant “very poor.” Readers should note “don’t know” responses have been removed from the data.

<i>Characteristics... (Consolidated Edison)</i>	<i>2013 Post-survey</i>			<i>2012 Post-survey</i>		
	<i>Total good</i>	<i>Total neutral</i>	<i>Total poor</i>	<i>Total good</i>	<i>Total neutral</i>	<i>Total poor</i>
Attention grabbing	66.7%	---	33.3	33.3	33.3	33.3
Providing specific instructions for natural gas emergencies	66.7	---	33.3	50.0	---	50.0
Increasing your knowledge about pipeline safety	66.7	---	33.3	66.7	---	33.3

<i>Characteristics...</i>	<i>2013 Post-survey</i>			<i>2012 Post-survey</i>		
	<i>Total good</i>	<i>Total neutral</i>	<i>Total poor</i>	<i>Total good</i>	<i>Total neutral</i>	<i>Total poor</i>
Attention grabbing	75.9%	15.5	8.6	69.2	17.9	12.8
Providing specific instructions for natural gas emergencies	78.9	8.8	12.3	75.7	10.8	13.5
Increasing your knowledge about pipeline safety	77.2	14.0	8.8	76.9	10.3	12.8

DEMOGRAPHICS

<i>Children under 18...</i>	<i>2013 Post-survey Composite</i>	<i>2012 Post-survey Composite</i>	<i>2013 Post-survey (Con Ed)</i>	<i>2012 Post-survey (Con Ed)</i>
None	74.9%	76.3	78.5	81.0
One	8.9	9.5	4.6	5.2
Two	9.5	8.3	12.3	10.3
Three	2.2	2.8	---	---
Four or more	1.9	1.3	---	---
Refused	2.6	2.0	4.6	3.4

<i>Own or Rent...</i>	<i>2013 Post-survey Composite</i>	<i>2012 Post-survey Composite</i>	<i>2013 Post-survey (Con Ed)</i>	<i>2012 Post-survey (Con Ed)</i>
Own	79.2%	72.5	49.2	48.3
Rent	18.0	23.8	47.7	48.3
Don't know/unsure	---	0.5	---	---
Refused	2.8	3.3	3.1	3.4

<i>Access to the internet at home, at work or both?</i>	<i>2013 Post-survey Composite</i>	<i>2012 Post-survey Composite</i>	<i>2013 Post-survey (Con Ed)</i>	<i>2012 Post-survey (Con Ed)</i>
Yes, at home	37.0%	28.5	43.1	31.0
Yes, at work	2.2	2.3	3.1	1.7
Yes, both home and work	34.9	45.0	26.2	39.7
No access	24.2	22.0	26.4	25.9
Don't know/unsure	1.7	2.3	3.1	1.7

<i>Age...</i>	<i>2013 Post-survey Composite</i>	<i>2012 Post-survey Composite</i>	<i>2013 Post-survey (Con Ed)</i>	<i>2012 Post-survey (Con Ed)</i>
18 to 25	0.9%	3.3	1.5	3.4
26 to 35	4.1	6.5	1.5	5.2
36 to 45	9.1	9.8	9.2	12.1
46 to 55	17.3	16.3	10.8	10.3
56 to 65	22.5	24.5	21.5	15.5
66 to 75	19.5	15.0	29.2	25.9
76 or older	16.5	18.5	10.8	22.4
Refused	10.0	6.3	15.4	5.2

<i>Hispanic...</i>	<i>2013 Post-survey Composite</i>	<i>2012 Post-survey Composite</i>	<i>2013 Post-survey (Con Ed)</i>	<i>2012 Post-survey (Con Ed)</i>
Yes	5.2%	7.3	20.0	17.2
No	88.1	89.3	69.2	79.3
Don't know/unsure	0.2	---	---	---
Refused	6.5	3.5	10.8	3.4

<i>Race...</i>	<i>2013 Post-survey Composite</i>	<i>2012 Post-survey Composite</i>	<i>2013 Post-survey (Con Ed)</i>	<i>2012 Post-survey (Con Ed)</i>
White	86.5%	79.0	78.8	79.2
African-American	7.6	7.3	5.8	12.5
Asian	4.7	1.6	---	---
Aleutian, Eskimo or American Indian	0.6	1.3	---	---
Pacific Islander	0.2	---	---	---
Other	0.2	3.0	---	2.1
Refused	---	7.8	15.4	6.3

<i>Education...</i>	<i>2013 Post-survey Composite</i>	<i>2012 Post-survey Composite</i>	<i>2013 Post-survey (Con Ed)</i>	<i>2012 Post-survey (Con Ed)</i>
Eighth grade or less	0.7%	1.5	1.5	1.7
Some high school	2.0	3.8	1.5	5.2
High school graduate	24.3	26.0	10.8	22.4
Some technical school	0.6	0.8	---	1.7
Technical school graduate	0.6	1.5	---	3.4
Some college	16.2	15.5	10.8	10.3
College graduate	32.0	25.0	46.2	22.4
Post graduate	15.8	20.8	13.8	29.3
Refused	7.8	5.3	15.4	3.4

<i>Income...</i>	<i>2013 Post-survey Composite</i>	<i>2012 Post-survey Composite</i>	<i>2013 Post-survey (Con Ed)</i>	<i>2012 Post-survey (Con Ed)</i>
Less than \$35,000	13.0%	14.0	10.8	19.0
\$35,000 to less than \$65,000	13.2	12.5	6.2	8.6
\$65,000 to less than \$95,000	9.1	10.0	4.6	10.3
\$95,000 or more	11.5	17.8	15.4	22.4
Don't know/unsure	4.1	6.5	4.6	8.6
Refused	49.1	39.3	58.5	31.0

<i>Gender...</i>	<i>2013 Post-survey Composite</i>	<i>2012 Post-survey Composite</i>	<i>2013 Post-survey (Con Ed)</i>	<i>2012 Post-survey (Con Ed)</i>
Male	40.1%	40.5	44.6	34.5
Female	59.9	59.5	55.4	65.5

INTERPRETATION OF AGGREGATE RESULTS

The computer processed data for this survey is presented in the following frequency distributions. It is important to note that the wordings of the variable labels and value labels in the computer-processed data are largely abbreviated descriptions of the Questionnaire items and available response categories.

The frequency distributions include the category or response for the question items. Responses deemed not appropriate for classification have been grouped together under the “Other” code.

The “NA” category label refers to “No Answer” or “Not Applicable.” This code is also used to classify ambiguous responses. In addition, the “DK/RF” category includes those respondents who did not know their answer to a question or declined to answer it. In many of the tables, a group of responses may be tagged as “Missing” – occasionally, certain individual’s responses may not be required to specific questions and thus are excluded. Although when this category of response is used, the computations of percentages are presented in two (2) ways in the frequency distributions: 1) with their inclusion (as a proportion of the total sample), and 2) their exclusion (as a proportion of a sample sub-group).

Each frequency distribution includes the absolute observed occurrence of each response (i.e. the total number of cases in each category). Immediately adjacent to the right of the column of absolute frequencies is the column of relative frequencies. These are the percentages of cases falling in each category response, including those cases designated as missing data. To the right of the relative frequency column is the adjusted frequency distribution column that contains the relative frequencies based on the legitimate (i.e. non-missing) cases. That is, the total base for the adjusted frequency distribution excludes the missing data. For many Questionnaire items, the relative frequencies and the adjusted frequencies will be nearly the same. However, some items that elicit a sizable number of missing data will produce quite substantial percentage differences between the two columns of frequencies. The meticulous analyst will cautiously consider both distributions.

The last column of data within the frequency distribution is the cumulative frequency distribution (Cum Freq.). This column is simply an adjusted frequency distribution of the sum of all previous categories of response and the current category of response. Its primary usefulness is to gauge some ordered or ranked meaning.