

## NJCEP 2007 Business Survey Topline Summary

### Key Findings

These results reflect a total sample size of 177 responses, collected during September and October 2007. The margin of error is +/-7 (95% confidence) or +/-6 (90% confidence).

Respondents are New Jersey businesses, including 71 small businesses (2-49 employees), 42 medium businesses (50-249 employees), 39 large businesses (250+ employees), and 25 SmartStart program participants of all sizes.

**Increased focus on energy efficiency:** 65% now say it is very important to limit or reduce energy usage in the business (compared to 49% in late 2005); 92% now say it is at least somewhat important (89% in 2005). 75% now say they are actively taking steps to conserve energy (63% in 2005).

**Energy efficiency drivers are bottom-line oriented:** 81% say their primary motivation for adopting an energy efficiency program would be reducing energy costs, achieving economic benefits, or following a strategic plan. Only 15% cite environmental or social motivations.

**Awareness of renewable energy has increased markedly in two years:** 71% now say they are familiar with the concept of renewable energy or clean power (compared to 56% in 2005).

**However, perceived importance of renewable energy has remained more stable:** 63% now say it is important to them that the energy used in their business/organization comes from renewable energy sources (59% in 2005). Nevertheless, 87% agree that the State should be investing in clean energy.

**Clean energy drivers are bottom-line oriented:** 70% say the primary motivation for adopting a renewable/clean energy program would be economic benefits/reduced costs/following a strategic plan. 26% cite environmental or social motivations.

**Large minorities are aware of State energy goals:** Awareness of the four goals tested ranges from 30% to 43%.

**Awareness of, and support for, the Societal Benefits Charge:** 52% say they are aware of the SBC. After it is defined for them, 58% say they support it.

**Businesses do not think the State of New Jersey does a good job in helping them address energy issues:** 19% give a positive response, 24% neutral, 52% negative. Perceptions of the BPU are similar.

**Program awareness is up markedly:** 46% now say they are aware of specific programs available in New Jersey that are designed to encourage energy efficiency or “clean power” for businesses (vs. 21% in 2005). Name recognition is highest for SmartStart, Solar Rebates, Solar Energy Certificates, and Clean Power Choice. Awareness of “an organization called the New Jersey Clean Energy Program, or NJCEP,” is 41%.

**New Jersey businesses continue to express interest in participating in energy efficiency or clean power programs:** 69% now say they are interested (same as in 2005).

**The most appealing program description tested is the “HVAC/Other” program with a one-year payback assumption.** 65% express interest in this program. Interest levels in other program descriptions/assumptions tested are also quite high, ranging from 57% to 64%. Generally speaking, interest in a program increases more with an improved payback assumption than with an improved ROI assumption.

**Ad awareness and information seeking on energy efficiency are up markedly:** 40% now say that in the past six months, they have seen or heard advertising or articles or received information about energy efficient products or services (vs. 21% in 2005). 46% now say they have personally sought out information on energy saving products or services (vs. 26% in 2005).

**Topline Summary**  
**Grafica/NJCEP Survey 2007 Business**  
*Total sample size: 177*

PROG. NOTE: Move in CUST from sample

<u>Customer Type:</u>	<u>Count:</u>
Small Business [2-49 employees; n=300]	71
Medium Business [50-249 employees; n=100]	42
Large Businesses [250+ employees; n=100]	39
SmartStart Completes [n=100]	25

PROG. NOTE: Move in COMPANY from sample

PROG. NOTE: Move in ADDRESS from sample

PROG. NOTE: Move in CITY from sample

HALF. Half Sample

PROG. NOTE: Rotate setting Half Sample

	<u>Count:</u>
Half Sample A	88
Half Sample B	89

[D&B list – All NJ businesses/organizations with two or more employees eligible. Energy usage information will not be available, but is asked in the survey so that results can be analyzed on that basis.]

Need to be sure all of the following organization types are included:

<u>Industry:</u>	<u>Count:</u>
▫ Retail	16
▫ Restaurant	5
▫ Offices	0
▫ Manufacturing	1
▫ Grocery	8
▫ Schools	4
▫ Colleges	2
▫ Warehouses	10
▫ Health	0
▫ Lodging	4
▫ Public Assembly	30
▫ Services	19
▫ Other	52

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Hello, I'm \_\_\_\_\_ from MSI Research; I'm calling on behalf of a New Jersey agency that is interested in feedback about the way businesses/organizations use electricity and natural gas, and the needs of New Jersey businesses/organizations when it comes to energy resources.

I need to speak to the person in your organization responsible for making decisions about how energy is used in this facility

Your company's participation in this important research will create a better understanding of how New Jersey businesses view the future of energy development in this state.

[IF NEEDED: I can assure you that we are not selling anything, not asking for money, and all your answers will be completely confidential. ]

[IF ASKED ABOUT RESEARCH SPONSORSHIP: Although I can tell you that this is a New Jersey based organization, the study is being conducted without naming them specifically in order to prevent biasing the answers. If you like I can identify the sponsor at the end of the interview.]

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QA. Have I reached (PROG. NOTE: INSERT COMPANY NAME, ADDRESS, & CITY)?

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QB. Can you please tell me the name of the person who makes decisions about the way electricity and natural gas are used in this (NOTE: BUSINESS/ORGANIZATION) and for the day-to-day energy usage in this (NOTE: BUSINESS/ORGANIZATION)? (IF RESPONDENT ANSWERS, "DON'T KNOW", THEN ASK TO SPEAK WITH SOMEONE WHO MIGHT KNOW AND REREAD INTRO WITH THE NEW RESPONDENT) (ASK AS OPEN END)

[RECORD FULL NAME]

[RECORD TITLE]

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QC. May I speak to (PROG. NOTE: RESTORE NAME FROM QB) now? (IF RESPONDENT NOT AVAILABLE, ASK: I would like to make an appointment to call (PROG. NOTE: RESTORE NAME FROM QB) at a specific time at his/her convenience. Could we please schedule a convenient time?)

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NOTE: IF NECESSARY, RE-READ INTRODUCTION TO RESPONDENT:

*Hello, I'm \_\_\_\_\_ from MSI Research; I'm calling on behalf of a New Jersey agency that is interested in feedback about the way businesses/organizations use electricity and natural gas, and the needs of New Jersey businesses/organizations when it comes to energy resources.*

*This is not a sales call. I'd like your views on some issues regarding energy use in New Jersey. We are not selling anything, not asking for money, and all your answers will be completely confidential.*

QD1. First, please tell me the scope of the energy decisions you make. Are you responsible for energy decisions...

<u>Total:</u>	
76%	At this location only
18	At more than one location in New Jersey
3	At more than one location in New Jersey and other states
3	At all of the company/organization's locations nationally or internationally
0	Not responsible for energy decisions {TERMINATE}
0	DK {TERMINATE}
0	REF {TERMINATE}

**(n = 177)**

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QD2. What is the name of your electric utility company? (*ASK AS AN OPEN END*)

<u>Total:</u>	
55%	PSE&G/Public Service Electric and Gas
30	JCP&L/Jersey Central Power and Light
4	Atlantic City Electric/Conectiv
11	Rockland Electric/Orange & Rockland
0	Other (Please specify) {TERMINATE}
0	DK {TERMINATE}
0	REF {TERMINATE}

**(n = 177)**

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QD3. What is the name of your natural gas utility company? (*ASK AS AN OPEN END*)

<u>Total:</u>	
45%	PSE&G/Public Service Electric and Gas
9	Do not have natural gas
7	New Jersey Natural Gas
10	South Jersey Gas
19	Elizabethtown Gas
4	Other (Please specify)
6	DK/REF

**(n = 177)**

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QE. GENDER (BY OBSERVATION)

<u>Total:</u>	
77%	Male
23	Female

**(n = 177)**

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Before we begin the survey...In order to maintain quality, this call may be monitored.

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**NOTE: AWARENESS AND ATTITUDES**

To begin...

A4. How important is it to you to limit or reduce the amount of energy used in your business/organization? Is it ...(*READ CODES 1-5*)

Total:

65%	Very important
27	Somewhat important
3	Neither important nor unimportant
2	Somewhat unimportant
2	Not at all important
1	DK/REF

**(n = 177)**

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{IF A4=1-5, ASK A4A; OTHERWISE CONTINUE}

A4A. Why is it (PROG NOTE: RESTORE A4 RESPONSE) that your business/organization limit or reduce the amount of energy it uses? (*ASK AS OPEN END, PROBE FOR SPECIFICS*)

**(n = 176)**

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A4C. Which of the following would be the primary motivation for your business/organization adopting an energy efficiency program? Would the primary motivation be... (*READ CODES 1-6*)

SCREEN DESIGN: ROTATE CODES 1-4

Total:

38%	To reduce energy costs
37	The economic benefits to my business
7	The environmental benefits overall
6	To help reduce greenhouse gases that contribute to global warming
6	Its part of our strategic business plan
2	The social benefits
3	Other benefits (Please specify)
1	DK/REF

**(n = 177)**

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A5. Has your business/organization done anything in the past two years to conserve energy, reduce energy usage or increase your businesses' energy efficiency?

<u>Total:</u>	
75%	Yes
23	No
2	DK/REF

**(n = 177)**

{IF A5=1, ASK A6; OTHERWISE GO TO A6A}

A6. What types of things have you done at your business? (ASK AS AN OPEN END; ALLOW 26 RESPONSES)

<u>Total:</u>	
43%	Buy energy efficient fluorescent light bulbs
20	Buy energy efficient equipment/appliances/computers/machinery
17	Turned off lights in rooms not in use
13	Adjusted thermostats/environmental controls
8	Added/replaced insulation
8	Installed occupancy sensor(s) to turn off lights when room not in use
6	Turned off computer(s) when not using it
5	Turned off appliances/machinery when not in use
5	Updated electronic ballasts on fluorescent fixtures
4	Used air conditioner less
4	Purchased heat recovery or mechanical recovery power generation equipment
4	Purchased solar panels
4	Used heat less
3	Replaced windows
2	Integrated renewable energy technologies at facilities
2	Signed-up for energy efficiency programs
2	Signed up for clean / green power programs
1	Conducted an energy audit
1	Used exterior lights less
0	Do not use sprinklers
0	Purchased fuel cell equipment
0	Purchased microturbine equipment
0	Purchased water source heat pumps
0	Updated specular reflectors on fluorescent fixtures
0	Used computer(s) less
35	Other (Please specify)
0	DK/REF

**(n = 132)**

A6A. Has your business/organization considered doing anything in the past two years to conserve energy, reduce energy usage or increase your businesses' energy efficiency that you did not end up implementing?

<u>Total:</u>	
29%	Yes
66	No
5	DK/REF

**(n = 177)**

{IF A6A=1, ASK A6B; OTHERWISE GO TO A1}

A6B. What types of things did you consider but did not implement? (*ASK AS AN OPEN END; ALLOW 26 RESPONSES*)

<u>Total:</u>	
33%	Purchase solar panels
8	Add/replace insulation
8	Buy energy efficient fluorescent light bulbs
6	Replace windows
4	Turn off computer(s) when not using it
4	Turn off lights in rooms not in use
4	Used air conditioner less
4	Used heat less
4	Updated electronic ballasts on fluorescent fixtures
2	Used computer(s) less
2	Used exterior lights less
2	Purchase heat recovery or mechanical recovery power generation equipment
2	Sign up for energy efficiency programs
2	Turn off appliances/machinery when not in use
2	Buy energy efficient equipment/appliances/computers/machinery
2	Install occupancy sensor(s) to turn off lights when room not in use
0	Adjust thermostats/environmental controls
0	Do not use sprinklers
0	Integrating renewable energy technologies at facilities
0	Purchase fuel cell equipment
0	Purchase microturbine equipment
0	Purchase water source heat pumps
0	Sign up for clean / green power programs
0	Conduct an energy audit
0	Updated specular reflectors on fluorescent fixtures
35	Other (Please specify)
6	DK/REF

**(n = 52)**

A6C. What prevented you from going ahead to implement this/these measure(s)? (*ASK AS AN OPEN END; PROBE FOR SPECIFIC BARRIERS/ROADBLOCKS*)

<u>Total:</u>	
64%	Cost
8	Lack of information
6	Management did not support
2	Lack of consensus within organization
2	Lack of resources
0	Lack of project partner/service provider
27	Other (Please specify)
2	DK/REF

**(n = 52)**

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A1. How familiar are you with the concept of RENEWABLE ENERGY or CLEAN POWER, where power is derived from energy sources that have a reduced impact on the environment and are capable of replenishing themselves? Are you..(*READ CODES 1-5*)

<u>Total:</u>	
34%	Very familiar
37	Somewhat familiar
3	Neither familiar nor unfamiliar
13	Somewhat unfamiliar
13	Very unfamiliar
0	DK/REF

**(n = 177)**

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A2. Based on your knowledge, what types of power would you consider to be renewable or clean? (*ASK AS OPEN END, ACCEPT 8 MENTIONS*)

<u>Total:</u>	
72%	Solar (i.e., The Sun)
56	Wind
27	Hydro-electric (i.e., water power)
16	Geothermal (i.e., Earth's heat)
8	Biomass (i.e., organic plant and waste material)
8	Nuclear
1	Clean Coal
15	Other (Please specify)
16	DK/REF

**(n = 177)**

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A3. Currently, how important is it to you that the energy that you use in your business/organization comes from renewable energy sources such as wind, solar and water power? Is it..(READ CODES 1-5)

<u>Total:</u>	
23%	Very important
40	Somewhat important
14	Neither important nor unimportant
13	Somewhat unimportant
9	Very unimportant
1	DK/REF

**(n = 177)**

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{IF A3=1-5, ASK A3A; OTHERWISE CONTINUE}

A3A. Why is it (PROG NOTE: RESTORE A3 RESPONSE) that your business/organization uses energy that is generated from renewable energy sources? (ASK AS OPEN END, PROBE FOR SPECIFICS)

**(n = 175)**

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A3C. Which of the following would be the primary motivation for your business/organization adopting a renewable/clean energy program? (READ CODES 1-7)

SCREEN DESIGN: ROTATE CODES 1-7

<u>Total:</u>	
33%	The economic benefits to our business
32	Reduce energy costs
19	The environmental benefits overall
4	It's part of our strategic business plan
4	The social benefits
3	It's important to our customers
3	Greenhouse gas reduction strategy
1	Other benefits (Please specify)
2	DK/REF

**(n = 177)**

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A3B. Are you aware of that the State of New Jersey has established specific goals regarding energy use, renewable energy or the reduction of greenhouse gases?

Total:  
43%                      Yes  
57                         No  
0                          DK/REF

**(n = 177)**

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A3D. Are you aware that the State of New Jersey has established the goal of generating 20% of the electricity used in the state from clean, renewable sources by 2020?

Total:  
34%                      Yes  
65                         No  
1                          DK/REF

**(n = 177)**

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A3E. Are you aware that the State of New Jersey has established the goal of reducing energy demand by 20% by 2020?

Total:  
30%                      Yes  
70                         No  
0                          DK/REF

**(n = 177)**

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A3F. Are you aware that the State of New Jersey has established the goal of reducing greenhouse gas emissions by 20% by 2020?

Total:  
38%                      Yes  
61                         No  
1                          DK/REF

**(n = 177)**

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A3G. Are you aware that your organization's electricity bill includes a Societal Benefits Charge, to help pay for energy efficiency and clean energy programs in New Jersey?

<u>Total:</u>	
52%	Yes
47	No
1	DK/REF

(n = 177)

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I'm going to give you some information about the Societal (PROG NOTE: Pronounce "sə-sī'ī-tl.") Benefits Charge and then ask whether or not you support it. New Jersey's Societal Benefits Charge was established as part of the State's transition to a deregulated market to ensure funding for programs with broad social and environmental benefit. All customers contribute approximately three percent of their monthly electric and natural gas bill to the SBC fund. A portion of the funds are then used to pay for clean energy programs that offer all New Jersey residents, businesses and municipalities incentives and rebates for the installation of energy efficient and renewable energy technologies including high efficient lighting, cooling, heating technologies as well as combined heat and power (CHP), solar photovoltaics (PROG. NOTE: Pronounced "foh-toh-vohl-**tey**-iks.") (solar panels/cells) or wind turbines.

A3H. Please tell me whether or not you support the collection through your company's energy bill of the Societal Benefits Charge I have just described, using a **zero** to **ten** point scale, where a **zero** means you **do not support the Societal Benefits Charge at all** and **ten** means you **strongly support** it.

[RECORD NUMBER 0-10]

<u>Total:</u>	
58%	6-10
29	9-10
29	6-8
15	5
24	0-4
3	DK/REF

(n = 154)

P1. Using a **zero** to **ten** point scale, where a **zero** means **poor** and **ten** means **excellent**, please tell me how good a job you think your electric utility does in helping you address your organization's energy issues.

[RECORD NUMBER 0-10]

<u>Total:</u>	
33%	6-10
9	9-10
24	6-8
20	5
41	0-4
6	DK/REF

(n = 177)

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P2. Using the same **zero** to **ten** point scale, where a **zero** means **poor** and **ten** means **excellent**, please tell me how good a job you think the State of New Jersey does in helping you address your organization's energy issues.

[RECORD NUMBER 0-10]

<u>Total:</u>	
19%	6-10
4	9-10
15	6-8
24	5
52	0-4
6	DK/REF

(n = 177)

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P3. Using the same **zero** to **ten** point scale, please tell me how good a job you think the New Jersey Board of Public Utilities does in helping you address your organization's energy issues.

[RECORD NUMBER 0-10]

<u>Total:</u>	
17%	6-10
3	9-10
14	6-8
18	5
54	0-4
11	DK/REF

(n = 177)

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Now I would like to read some statements on such topics as energy efficiency, clean power, and the environment. For each one that I read please tell me whether you agree, disagree, or neither agree nor disagree. (IF AGREE/DISAGREE ASK: DO YOU STRONGLY OR ONLY SOMEWHAT AGREE/DISAGREE?)

(RANDOMIZE A9-A15)

A9. The state should be investing in clean energy technologies and the development of a market that supports energy efficient and renewable energy technologies.

<u>Total:</u>	
60%	Strongly agree
27	Somewhat agree
4	Neither agree nor disagree
4	Somewhat disagree
4	Strongly disagree
1	DK/REF

**(n = 177)**

A10. Using clean, renewable energy sources is important for the environment and reducing greenhouse gases even if it costs my organization more.

<u>Total:</u>	
22%	Strongly agree
43	Somewhat agree
8	Neither agree nor disagree
14	Somewhat disagree
11	Strongly disagree
2	DK/REF

**(n = 177)**

A11. Using energy more efficiently is an important way for my business or organization to improve the bottom line through lower operating costs.

<u>Total:</u>	
66%	Strongly agree
27	Somewhat agree
4	Neither agree nor disagree
3	Somewhat disagree
0	Strongly disagree
0	DK/REF

**(n = 177)**

- A12. A single agency able to offer Technical assistance and financial incentives, is AN ideal mechanism to drive businesses to adopt clean energy technologies and to produce tangible and long-term energy savings.

<u>Total:</u>	
33%	Strongly agree
38	Somewhat agree
9	Neither agree nor disagree
11	Somewhat disagree
8	Strongly disagree
1	DK/REF

**(n = 177)**

- A13. Businesses need to think about their profits and their employees first. Investing time and resources to help the environment and reduce greenhouse gases just means higher prices for consumers.

<u>Total:</u>	
23%	Strongly agree
33	Somewhat agree
8	Neither agree nor disagree
24	Somewhat disagree
11	Strongly disagree
1	DK/REF

**(n = 177)**

- A14. Locating qualified design professionals with expertise in energy efficient buildings can be a significant challenge for organizations attempting to lower their energy usage.

<u>Total:</u>	
37%	Strongly agree
36	Somewhat agree
10	Neither agree nor disagree
10	Somewhat disagree
3	Strongly disagree
4	DK/REF

**(n = 177)**

A15. Our organization's next construction project or retrofit (PROG. NOTE: Pronounced "re-troh-fit.") upgrade will make use of high efficiency equipment wherever possible.

<u>Total:</u>	
53%	Strongly agree
30	Somewhat agree
6	Neither agree nor disagree
4	Somewhat disagree
2	Strongly disagree
5	DK/REF

(n = 177)

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**NOTE: PROGRAM KNOWLEDGE**

Now, on another subject...

G1. Are you currently aware of any specific programs available in New Jersey that are designed to encourage energy efficiency or the purchase of renewable energy or "clean power" by businesses/organizations?

<u>Total:</u>	
46%	Yes
52	No
2	DK/REF

(n = 177)

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{IF G1=1 ASK G2; OTHERWISE GO TO FILTER BEFORE G3}

G2. Do you remember the names of any of these programs? (ASK AS AN OPEN END; ALLOW 9 RESPONSES)

<u>Total:</u>	
22%	New Jersey SmartStart Buildings
2	Clean Power Choice
5	New Jersey Solar Rebate Program
2	Solar Renewable Energy Certificates
1	Renewable Energy Project Grants and Financing
0	Combined Heat & Power (CHP) Program
0	Renewable Energy Business Venture Assistance
0	Cool Choice Program
17	Other (Please specify)
6	None
43	Don't recall
4	DK/REF

(n = 81)

{IF G2=1-9, ASK G3; OTHERWISE GO TO INTRO BEFORE G6}

G3. Has your business participated in any of these programs?

<u>Total:</u>	
76%	Yes
21	No
3	DK/REF

**(n = 38)**

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{IF G3=1, ASK G4; OTHERWISE GO TO INTRO BEFORE G6}

G4. Do you happen to remember the names of the programs in which your business participated? (*ASK AS AN OPEN END; ALLOW UP TO 9 RESPONSES*)

<u>Total:</u>	
52%	New Jersey SmartStart Buildings
14	New Jersey Solar Rebate Program
7	Solar Renewable Energy Certificates
3	Renewable Energy Project Grants and Financing
3	Combined Heat & Power (CHP) Program
0	Renewable Energy Business Venture Assistance
0	Clean Power Choice
0	Cool Choice Program
24	Other (Please specify)
3	None
7	Don't recall
0	DK/REF

**(n = 29)**

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PROG. NOTE: IF RESPONDENT IS AWARE OF ALL OF THE PROGRAMS IN G2 AND/OR G4  
GO TO FILTER ABOVE G14; OTHERWISE CONTINUE

Have you heard of any of the following?

SCREEN DESIGN: RANDOMIZE QUESTIONS G6-G11

PROG. NOTE: ONLY RESTORE CODES NOT MENTIONED IN G2 OR G4

{IF G2 NE 1, ASK G6; OTHERWISE CONTINUE}

G6. COMBINED HEAT & POWER (CHP) PROGRAM

<u>Total:</u>	
10%	Yes
89	No
1	DK/REF

**(n = 177)**

{IF G2 NE 2, ASK G6; OTHERWISE CONTINUE}

G7. NEW JERSEY SMARTSTART BUILDINGS

<u>Total:</u>	
47%	Yes
53	No
0	DK/REF

**(n = 173)**

{IF G2 NE 3, ASK G6; OTHERWISE CONTINUE}

G5. NEW JERSEY SOLAR REBATE PROGRAM

<u>Total:</u>	
49%	Yes
50	No
1	DK/REF

**(n = 175)**

{IF G2 NE 4, ASK G6; OTHERWISE CONTINUE}

G10. SOLAR RENEWABLE ENERGY CERTIFICATES

<u>Total:</u>	
27%	Yes
73	No
0	DK/REF

**(n = 175)**

{IF G2 NE 5, ASK G6; OTHERWISE CONTINUE}

G8. RENEWABLE ENERGY BUSINESS VENTURE ASSISTANCE

<u>Total:</u>	
8%	Yes
92	No
0	DK/REF

**(n = 177)**

{IF G2 NE 6, ASK G6; OTHERWISE CONTINUE}

G9. RENEWABLE ENERGY PROJECT GRANTS AND FINANCING

<u>Total:</u>	
23%	Yes
76	No
1	DK/REF

**(n = 177)**

{IF G2 NE 7, ASK G6; OTHERWISE CONTINUE}

G12. CLEAN POWER CHOICE

<u>Total:</u>	
26%	Yes
74	No
0	DK/REF

**(n = 175)**

{IF G2 NE 8, ASK G6; OTHERWISE CONTINUE}

G11. COOL CHOICE PROGRAM

<u>Total:</u>	
10%	Yes
89	No
1	DK/REF

**(n = 177)**

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{IF AWARE=1, ASK G13; OTHERWISE CONTINUE.}

G13. How did you become aware of the program(s) you mentioned? (ASK AS OPEN END, ACCEPT MULTIPLE RESPONSES)

<u>Total:</u>	
11%	Website/Internet [Specify website(s)]
8	Newspaper article [Specify publication (s)]
4	From a contractor or subcontractor
4	From a supplier
4	From an account manager at the electric/energy company
4	Newspaper ad [Specify publication(s)]
3	Television report/show [Specify station(s)]
3	Trade publications [Specify publication(s)]
3	From another employee of the company
3	Brochure mailed to your business
3	Information from salespeople
3	News (Non-specific)
3	With the monthly electricity bill
2	Signs at retail stores [Specify store(s)]
2	Television ad
2	From an architect or engineer
2	From business colleagues
1	Radio ad [Specify station(s)]
0	Brochures at retail stores
0	On product packages
0	Radio report/show [Specify station(s)]
0	Tradeshaw or conferences [Specify name of event(s)]
33	Other (Please specify)
17	DK/REF

**(n = 158)**

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{IF (G1=2, DK, REF) OR (G3=2, DK OR REF), ASK G14; OTHERWISE CONTINUE}

G14. In general, how interested would your business be to participate in an energy efficiency or clean power program? Would you be... (READ CODES 1-5)

Total:

20%	Very interested
49	Somewhat interested
10	Neither interested nor uninterested
7	Somewhat uninterested
9	Very uninterested
5	DK/REF

**(n = 105)**

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I am now going to provide you with some basic information about programs that are or may become available to help New Jersey businesses be more energy efficient and use more clean, renewable energy. After describing each program, I will ask how interested your business would be in participating.

PROG. NOTE: RANDOMIZE BLOCKS 1-6

How likely would you be to participate in this program?

BLOCK 1

**(Note: V1 Clean Energy Financing and Assistance Program)**

In the first/another program, help is available for businesses that want to undertake energy efficiency and renewable energy projects in New Jersey. The program makes it more affordable and cost effective for businesses to invest in the most efficient equipment, and realize substantial energy cost savings as well as environmental benefits through the use of the cleanest forms of energy.

{IF HALF =1 ASK Q15A; OTHERWISE CONTINUE}

Q15A. The program provides low-interest loans up to \$1 million, grants up to \$500,000 and consultant services. It typically delivers a 10% annual return on investments made by participating businesses.

Total:

22%	Very likely
30	Somewhat likely
9	Neither likely nor unlikely
14	Somewhat unlikely
19	Very unlikely
1	Already participating/have already adopted these measures
5	DK/REF

**(n = 88)**

{IF HALF=2 ASK Q15B; OTHERWISE CONTINUE}

Q15B. The program provides low-interest loans up to \$1 million, grants up to \$500,000 and consultant services. It typically delivers a 15% annual return on investments made by participating businesses.

Total:

24%	Very likely
35	Somewhat likely
13	Neither likely nor unlikely
14	Somewhat unlikely
11	Very unlikely
0	Already participating/have already adopted these measures
3	DK/REF

**(n = 89)**

BLOCK 2

**(Note: Lighting)**

The first/another program focuses on lighting retrofits. The average commercial facility spends nearly 25% of its electric bill on lighting and, in recent years, a number of high-efficiency lighting technologies have become available. In addition to reducing the cost of lighting, a high-efficiency retrofit can also reduce air conditioning costs and dramatically improve worker productivity.

{IF HALF =1 ASK Q16A; OTHERWISE CONTINUE}

Q16A. The program provides financial incentives that lower the up-front cost of high efficiency lighting retrofits and typically result in a payback period between two and three years.

<u>Total:</u>	
27%	Very likely
30	Somewhat likely
1	Neither likely nor unlikely
4	Somewhat unlikely
14	Very unlikely
22	Already participating/have already adopted these measures
2	DK/REF

**(n = 88)**

[IF HALF=2 ASK Q16B; OTHERWISE CONTINUE}

Q16B. The program provides financial incentives that lower the up-front cost of high efficiency lighting retrofits and typically result in a payback period of one year.

<u>Total:</u>	
33%	Very likely
31	Somewhat likely
3	Neither likely nor unlikely
9	Somewhat unlikely
6	Very unlikely
18	Already participating/have already adopted these measures
0	DK/REF

**(n = 89)**

BLOCK 3

**(Note: HVAC/Other)**

The first/another program addresses heating, water heating, ventilation and air conditioning equipment. A number of high-efficiency options exist that can significantly reduce the cost of electricity and/or natural gas. The program helps building owners to invest in energy efficient equipment for new construction or retrofit by covering about 80% of the increased cost of the equipment.

{IF HALF =1 ASK Q17A; OTHERWISE CONTINUE}

Q17A. The incentive usually results in an investment payback period of two to three years.

<u>Total:</u>	
28%	Very likely
31	Somewhat likely
4	Neither likely nor unlikely
6	Somewhat unlikely
17	Very unlikely
9	Already participating/have already adopted these measures
5	DK/REF

**(n = 88)**

{IF HALF=2 ASK Q17B; OTHERWISE CONTINUE}

Q17B. The incentive usually results in an investment payback period of one year.

<u>Total:</u>	
38%	Very likely
37	Somewhat likely
8	Neither likely nor unlikely
6	Somewhat unlikely
8	Very unlikely
1	Already participating/have already adopted these measures
2	DK/REF

**(n = 89)**

BLOCK 4

**(Note: V2 Clean Energy Financing and Assistance Program)**

The first/another program encourages businesses to invest in high-efficiency equipment, and realize substantial energy cost savings as well as environmental benefits through the use of the cleanest forms of energy. Financing and, in some cases, grants are available for businesses that want to undertake energy efficiency and renewable energy projects. The program eliminates the up-front capital cost associated with these investments and makes it possible for businesses to benefit from lower energy expenses achieved through new construction or retrofit projects.

{IF HALF =1 ASK Q18A; OTHERWISE CONTINUE}

Q18A. The program is designed to deliver a 10% annual return on investments made by participating businesses.

<u>Total:</u>	
18%	Very likely
44	Somewhat likely
7	Neither likely nor unlikely
10	Somewhat unlikely
15	Very unlikely
1	Already participating/have already adopted these measures
5	DK/REF

**(n = 88)**

{IF HALF=2 ASK Q18B; OTHERWISE CONTINUE}

Q18B. The program is designed to deliver a 15% annual return on investments made by participating businesses.

<u>Total:</u>	
19%	Very likely
44	Somewhat likely
11	Neither likely nor unlikely
13	Somewhat unlikely
11	Very unlikely
0	Already participating/have already adopted these measures
2	DK/REF

**(n = 89)**

BLOCK 5

**(Note: Combined Heat and Power)**

The first/another program provides financial incentives for on-site power generation systems that recover and make productive use of waste heat. These “combined heat and power” systems are highly efficient because they recover the heat that would otherwise be wasted during the generation of electricity and make use of that energy for commercial or industrial processes, to produce hot water or steam, or even for space conditioning and dehumidification.

{IF HALF =1 ASK Q19A; OTHERWISE CONTINUE}

Q19A. The program provides up to \$1 million in financial incentives that lower the up-front cost of installing a combined heat and power system. This typically results in a payback period between four and five years.

<u>Total:</u>	
14%	Very likely
31	Somewhat likely
4	Neither likely nor unlikely
12	Somewhat unlikely
31	Very unlikely
1	Already participating/have already adopted these measures
7	DK/REF

**(n = 88)**

{IF HALF =2 ASK Q19B; OTHERWISE CONTINUE}

Q19B. The program provides up to \$1 million in financial incentives that lower the up-front cost of installing a combined heat and power system. This typically results in a payback period between two and three years.

<u>Total:</u>	
15%	Very likely
36	Somewhat likely
9	Neither likely nor unlikely
15	Somewhat unlikely
22	Very unlikely
1	Already participating/have already adopted these measures
2	DK/REF

**(n = 89)**

BLOCK 6

**(Note: Renewable Technologies)**

The first/another program offers financial incentives, technical support and educational materials to support the installation of technologies that enable businesses to produce their own electricity from renewable sources, such as solar panels, wind power, or fuel cells. These systems help protect the environment and reduce the strain on the existing electric transmission and distribution grid.

{IF HALF =1 ASK Q20A; OTHERWISE CONTINUE}

Q20A. The program provides financial incentives for qualified installations that cover 50-60% of the capital cost. This usually results in an investment payback period of five years.

Total:

22%	Very likely
35	Somewhat likely
8	Neither likely nor unlikely
9	Somewhat unlikely
23	Very unlikely
1	Already participating/have already adopted these measures
2	DK/REF

**(n = 88)**

{IF HALF =2 ASK Q20B; OTHERWISE CONTINUE}

Q20B The program provides financial incentives for qualified installations that cover 50-60% of the capital cost. This usually results in an investment payback period of three years.

Total:

24%	Very likely
39	Somewhat likely
13	Neither likely nor unlikely
10	Somewhat unlikely
11	Very unlikely
1	Already participating/have already adopted these measures
2	DK/REF

**(n = 89)**

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G21. If your company/organization were interested in signing up for an energy efficiency or clean power program, who would you contact or where would you go in order to research additional information? *(ASK AS OPEN END, PROBE FOR SPECIFICS)*

**(n = 177)**

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G22A. Are you aware of an organization called New Jersey Clean Energy Program, or NJCEP?

<u>Total:</u>	
39%	Yes
60	No
1	DK/REF

**(n = 177)**

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{IF G22A=1 ASK G22B; OTHERWISE GO TO IN1}

G22B. Have you ever contacted the New Jersey Clean Energy Program or visited their website?

<u>Total:</u>	
53%	No
17	Yes, visited website
16	Both, contacted and visited website
14	Yes, contacted/wrote/called/emailed
0	DK/REF

**(n = 70)**

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{IF G22B=1-3, ASK G22C; OTHERWISE GO TO IN1}

G22C. Did you contact or visit the New Jersey Clean Energy Program website during the past year?

<u>Total:</u>	
91%	Yes
6	No
3	DK/REF

**(n = 33)**

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**NOTE: UNAIDED AWARENESS OF COMMUNICATIONS**

IN1. In the past six months, have you seen or heard any advertising or articles or have you received any information about any type of energy efficient products or services?

<u>Total:</u>	
40%	Yes
59	No
1	DK/REF

**(n = 177)**

{IF IN1=1, ASK IN1A; OTHERWISE GO TO IN3}

IN1A. What do you recall about what you read, saw or heard? (*ASK AS OPEN END, PROBE FOR SPECIFICS*)

**(n = 70)**

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IN2. Where did you get this information? (*ASK AS AN OPEN END; ALLOW 23 RESPONSES*)

Total:

23%	Brochure mailed to your business
16	Website/Internet [Specify website(s)]
9	With the monthly electricity bill
7	Newspaper ad [Specify publication(s)]
7	Newspaper article [Specify publication (s)]
7	Trade publications [Specify publication(s)]
4	Television ad
3	Television report/show [Specify station(s)]
3	Information from salespeople
3	Radio ad [Specify station(s)]
1	From a contractor or subcontractor
1	From a supplier
1	From an account manager at the electric/energy company
1	From business colleagues
1	News (Non-specific)
1	Tradeshaw or conferences [Specify name of event(s)]
0	Brochures at retail stores
0	From another employee of the company
0	On product packages
0	Radio report/show [Specify station(s)]
0	Signs at retail stores [Specify store(s)]
0	From an architect or engineer
24	Other (Please specify)
7	DK/REF

**(n = 70)**

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IN3. During the past year, have you personally sought out information on energy saving products or services?

Total:

46%	Yes
54	No
0	DK/REF

**(n = 177)**

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{IF IN3=1, ASK IN4; OTHERWISE GO TO INTRO BEFORE F1}

IN4. Where did you look for this information? (ASK AS AN OPEN END; ALLOW 23 RESPONSES)

Total:

51%	Website/Internet [Specify website(s)]
7	From a contractor or subcontractor
7	From a supplier
5	From an account manager at the electric/energy company
5	Trade publications [Specify publication(s)]
4	From an architect or engineer
2	Signs at retail stores [Specify store(s)]
1	Brochure mailed to your business
1	With the monthly electricity bill
1	From business colleagues
1	Newspaper ad [Specify publication(s)]
1	Brochures at retail stores
1	Information from salespeople
0	Television report/show [Specify station(s)]
0	From another employee of the company
0	News (Non-specific)
0	Radio report/show [Specify station(s)]
0	Newspaper article [Specify publication (s)]
0	On product packages
0	Radio ad [Specify station(s)]
0	Television ad
0	Tradeshow or conferences [Specify name of event(s)]
30	Other (Please specify)
0	DK/REF

**(n = 82)**

**NOTE: FIRMOGRAPHICS**

Now, a few questions for classification purposes....

F1. I am going to read a list of 14 different industries, and I would like you to classify the primary business activity at this location into one of the following categories. (*READ CODES 1-14*)

Total:

17%	Manufacturing
13	Retail
10	Education
9	Services
9	Medical/Health Care
6	Finance, Insurance, Real Estate
6	Transportation, Communication, Electric, Gas, and Sanitary
4	Wholesale Trade
4	Non-Profit (unspecified)
2	Religion
2	Construction
1	Non-Classifiable
1	Agriculture
1	Public Administration
0	Mining
14	Other (Please Specify)
1	DK/REF

**(n = 177)**

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F2. How many employees work at this location? (ASK AS OPEN END) (READ CODES 1-13 IF NECESSARY)

<u>Total:</u>	
6%	1 employee
19	2 to 4 employees
11	5 to 9 employees
9	10 to 24 employees
7	25 to 49 employees
15	50 to 99 employees
15	100 to 249 employees
8	250 to 499 employees
4	500 to 999 employees
4	1,000 to 2,499 employees
2	2,500 to 4,999 employees
0	5,000 to 9,999 employees
0	10,000 or more employees
0	DK/REF

(n = 177)

F3. How many business locations does your (business/organization) have in this state?

[RECORD NUMBER FROM 1-996]

<u>Total:</u>	
57%	1
15	2
7	3
2	4
6	5-10
10	11+
3	DK/REF

(n = 177)

F4. Would you please tell me approximately what the TOTAL BUSINESS REVENUES at your business location were in 2006? (READ CODES 1-6 IF NECESSARY)

Total:

12%	Under \$250,000
6	\$250,000 to \$499,999 (less than \$500,000)
6	\$500,000 to \$999,999 (less than \$1,000,000)
13	\$1 million to \$4,999,999 (less than \$5,000,000)
4	\$5 million to \$9,999,999 (less than \$10,000,000)
23	\$10 million or more
36	DK/REF

(n = 177)

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F5A. And in an average month, how much is your business's total electricity bill? (ASK AS OPEN END)

Total:

8%	\$0-\$200
14	\$201-\$500
10	\$501-\$1000
12	\$1001-\$5000
12	\$5001-\$25000
6	\$25001-\$50000
11	\$50001+
27	DK/REF

(n = 177)

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{IF QD3 NE 5,DK,REF ASK F5B; OTHERWISE CONTINUE}

F5B. And in an average month, how much is your business's total natural gas bill? (ASK AS OPEN END)

Total:

17%	\$0-\$200
7	\$201-\$500
4	\$501-\$1000
13	\$1001-\$5000
14	\$5001-\$25000
4	\$25001-\$50000
2	\$50001+
39	DK/REF

(n = 132)

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F6. Does your (business/organization) own or lease the building at this address?

Total:  
66% Own  
32 Lease (Rent)  
2 DK/REF

(n = 177)

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F7. How many years has your business been at its current location?

Total:  
4% Less than one year  
8 One or two years  
12 3 – 5 years  
14 6 – 10 years  
20 11 – 20 years  
9 21 – 30 years  
31 More than 30 years  
2 DK/REF

(n = 177)

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F8. Do you know about how large your business location is in square feet? (*PROBE FOR BEST GUESS*)

Total:  
8% 0-1000  
8 1001-2000  
4 2001-3000  
6 3001-5000  
9 5001-10000  
14 10001-30000  
24 30001+  
27 DK/REF

(n = 177)

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SHARE. Do I have your permission to share your individual responses with the sponsor of this research? [IF ASKED ABOUT RESEARCH SPONSORSHIP, SAY: This study is being conducted for the **New Jersey Office of Clean Energy**.]

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*NJCEP Business Customer Survey Topline*  
*November 6, 2007*

That is all of the questions that we have for you today. We would like to “Thank you” very much your taking part if this very important research. Have a nice day.