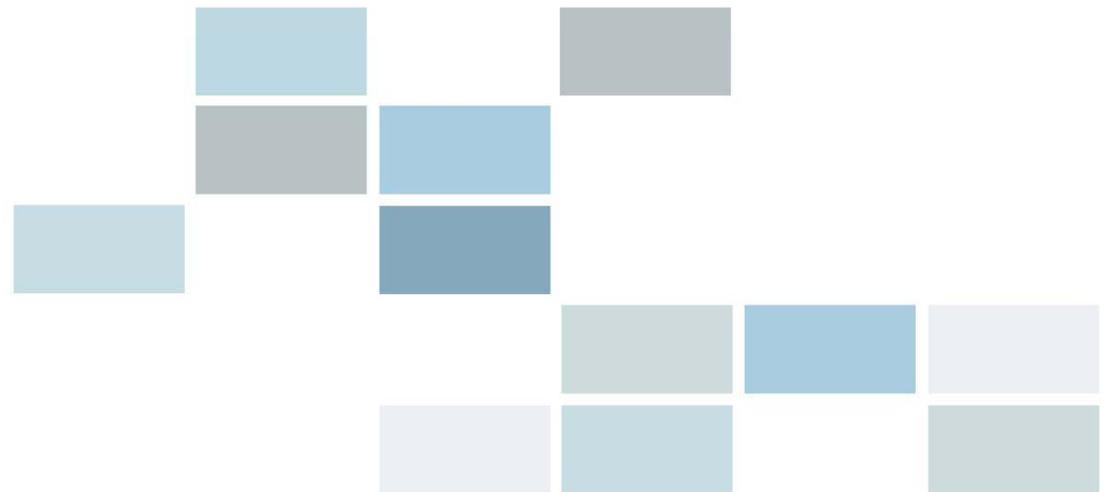


New Jersey Clean Energy Program Summary Report: Residential Focus Groups

March 31, 2008



Report Contents

Methodology	2
Objectives	4
Executive Summary	5
Detailed Findings with Consumer Comments	
Needs, Awareness, Attitudes and Perceptions About Energy Efficiency and Renewable Energy	12
State Role	16
Marketing Communications	20
Program Value Propositions and Attributes	27
Communication Channels	37
Appendix	39

Methodology

Market Strategies International, Inc. conducted a total of four focus groups with residential customers, March 18-19, 2008:

Marlton: Tuesday, March 18, 6:00 pm & 8:00 pm

Edison: Wednesday, March 19, 6:00 pm & 8:00 pm

The groups averaged approximately 110 minutes in length. All participants received incentive payments. Audio and videotapes were made, and transcripts developed.

Please note: This is *qualitative* research, conducted in two locations with 40 participants. Findings should be treated as directional.

For a copy of the discussion guide and details on the participants in each group, please see the Appendix.

Methodology, continued

The characteristics of the customers who participated in the focus groups were:

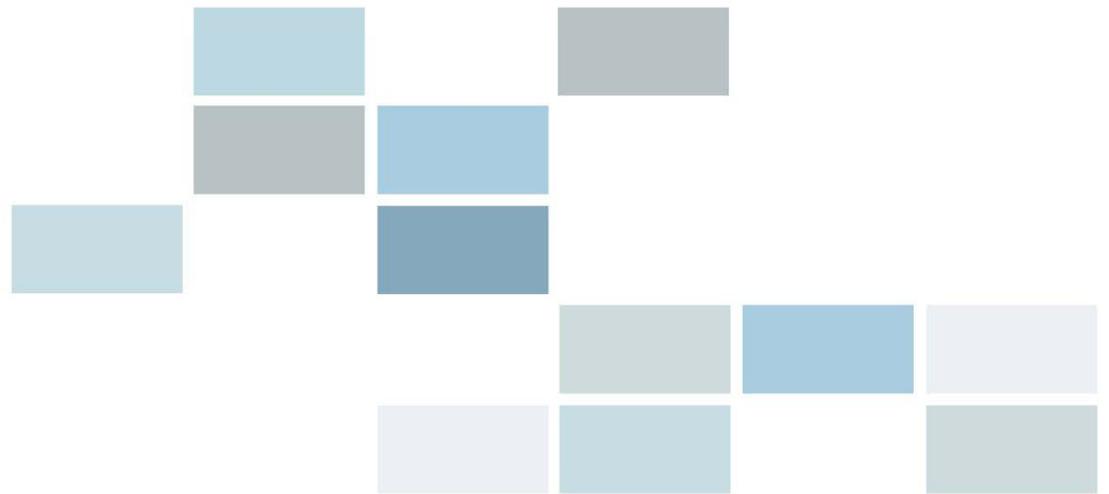
GENERAL	Residential customers, 25+ years of age, household's energy decision-maker
PARTICIPATION	Approximately half current or recent participants in NJCEP programs, half non-participants
ETHNICITY	Mix of Caucasian, African American, Hispanic, Asian
EDUCATION	Mix of education levels, from some high school to post graduate
INCOME	Mix of income categories, from <\$30K to more than \$75K per year
AGE	Mix of age groups, from 25 to 55+
GENDER	Mix of males and females

Objectives

The New Jersey Clean Energy Program's (NJCEP's) primary objectives for this research were:

- To better understand NJ residents' needs, awareness, attitudes and perceptions about energy efficiency, renewable energy, and the NJCEP programs.
- To probe their likes and dislikes with respect to current NJCEP programs and offers.
- To identify and understand key motivating factors for participating, as well as roadblocks to participation.
- To understand the decision-making process people use to determine whether to participate in energy efficiency and clean energy programs.
- To explore which channels/communication vehicles will work best to communicate program benefits.
- To explore their levels of interest in current and potential future program designs/design elements.
- To gauge their receptiveness to current and potential future message strategies and communication concepts and materials, if available.
- To identify opportunities to encourage more people to make investments in energy efficiency and clean energy.
- To understand their feelings about state sponsorship of these programs, and what they feel the role of New Jersey's state government should be.

Executive Summary



Executive Summary

Given high energy costs, New Jersey consumers are strongly focused on saving money. Programs should highlight and document potential cost savings whenever possible.

While cost considerations tend to be top of mind, there are other key motivations that drive consumer interest in energy efficiency and clean energy programs, including:

- Environmental benefits (reducing greenhouse gases and other pollution)
- Concern about dependence on foreign sources of energy
- Opportunity to increase the value of the home
- Health benefits
- Improving comfort/quality of life

On the other hand, community or social motivations do not appear to be very important drivers of behavior for New Jersey energy consumers at this time.

The upcoming consumer survey offers an opportunity to understand and prioritize these multiple motivations more fully.

Executive Summary

Residential customers question whether the State's efforts to encourage energy efficiency and renewable energy are as aggressive, well-designed and productive as they could be.

- Awareness of the role played by the State of New Jersey is low, even among NJCEP program participants.
- Consumers do not recognize that energy efficiency and clean power are important State goals, or see New Jersey as a leading state in these areas.
- Consumers were not able to name any NJCEP programs, including the ones they had participated in themselves.
- They also were not aware of broader State initiatives, such as 20% by 2020 or the Energy Master Plan. They did not feel that energy is an important concern for Governor Corzine, or that he is showing strong leadership on efficiency and clean power.
- Consumers in Edison were unaware that their county is a “partner community.”

It will be important to see whether these findings are confirmed by the quantitative consumer survey.

Executive Summary

Four NJCEP informational campaigns were evaluated and discussed during the groups. In rough order of preference among the consumers, they were:

- Residential Energy Efficiency Programs – Family
- Home Performance with Energy Star
- Whole House/Whole Community
- Residential Energy Efficiency Programs – Community

The groups responded much more favorably to messages that focused on benefits to their own families, rather than on broader, community-wide appeals.

They liked seeing evidence that NJCEP programs can bring smart, innovative technology to bear to help them save energy.

They liked the “whole house” concept but expressed considerable distrust of contractors, and felt that initial audits should be provided free, if possible, or at a very low fixed cost, without obligation.

The Energy Efficiency Program brochures were praised as providing a great deal of usable information clearly, and the do-it-yourself “tips” were well-received.

Executive Summary

Five NJCEP programs were evaluated and discussed during the groups. In rough order of consumer preference, they were:

- Energy Star Products
- New Jersey Energy Star Homes
- Home Performance with Energy Star
- HVAC Program
- Clean Power Choice

All of the programs had significant appeal -- half or more said they were likely or very likely to participate in each program.

Key perceived benefits include the ability to identify and prioritize opportunities to save energy and money, and to do something about environmental/global warming concerns.

Key roadblocks include upfront costs and distrust that contractors will work in the homeowner's best interest. These concerns will inhibit participation, unless they are addressed effectively.

Executive Summary

Each group included a discussion of communication channels to help identify the best ways for NJCEP to reach out to New Jersey consumers.

- Consumers indicated that television advertising would be the most effective approach for increasing the awareness and interest of the general public.
- Other media suggested were radio, newspapers, billboards, direct mail and home shows. There were few mentions of Internet/online communications.
- Nevertheless, all of the program participants indicated that they became involved not through any type of media exposure, but rather through third party influence: trade allies or retailers made them aware of the program benefits available to them.

NJCEP marketing strategy should continue to strengthen and leverage trade ally buy-in to the programs. Complementing this with more aggressive consumer marketing – to the extent possible given budget constraints – could build a strong “push-pull” marketing mix.

Implications for the Consumer Survey

The upcoming survey offers an opportunity to understand more fully consumers' multiple motivations for getting involved with energy efficiency and clean energy, and to prioritize their importance.

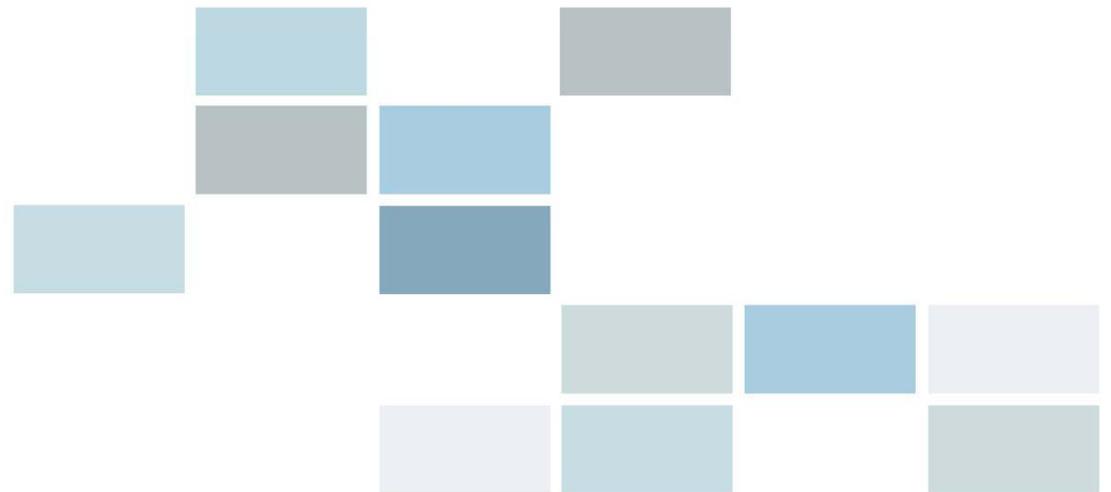
If NJCEP plans to continue stressing the “community” theme, the survey could be used to test alternative, more effective ways of communicating about it.

It will be important to see whether the finding that consumers are unaware of State activities are confirmed by the quantitative consumer survey.

The survey can be used to test strategies for addressing consumer objections to paying the upfront costs of whole house audits, and their overall distrust of contractors. Can NJCEP's trade allies, who appear now to be the most effective consumer marketing channel, be positioned more effectively as trusted partners for homeowners?

The survey should include an adequate representation of program participants, to confirm or challenge focus group findings about them, including their low program awareness, reliance on trade allies, etc.

Needs, Awareness, Attitudes and Perceptions About Energy Efficiency and Renewable Energy



Energy Efficiency & Renewable Energy

Motivations for energy efficiency and using renewable energy are largely oriented toward controlling energy costs/saving money.

- All participants and non-participants readily acknowledge the importance of using energy efficiently and increasing the use of renewable energy. (Note: People with little or no interest in these topics were “screened out” during the recruiting process.)
- Reducing cost is the first top-of-mind motivation offered for both efficiency and renewables. The assumption seems to be that clean power will stabilize/reduce costs over time.
- Those with experience with, or strong interest in, solar power and other clean energy solutions mention rebates and incentives that make them attractive economically.

Yet there are other important drivers: environmental benefits (reducing greenhouse gases and other pollution), concern about dependence on foreign sources of energy, opportunity to increase the value of the home, health benefits, and improving comfort/quality of life.

- For most, community or social motivations do not appear to be important at this time, although a few mention motivations such as doing the right thing or setting a good example.

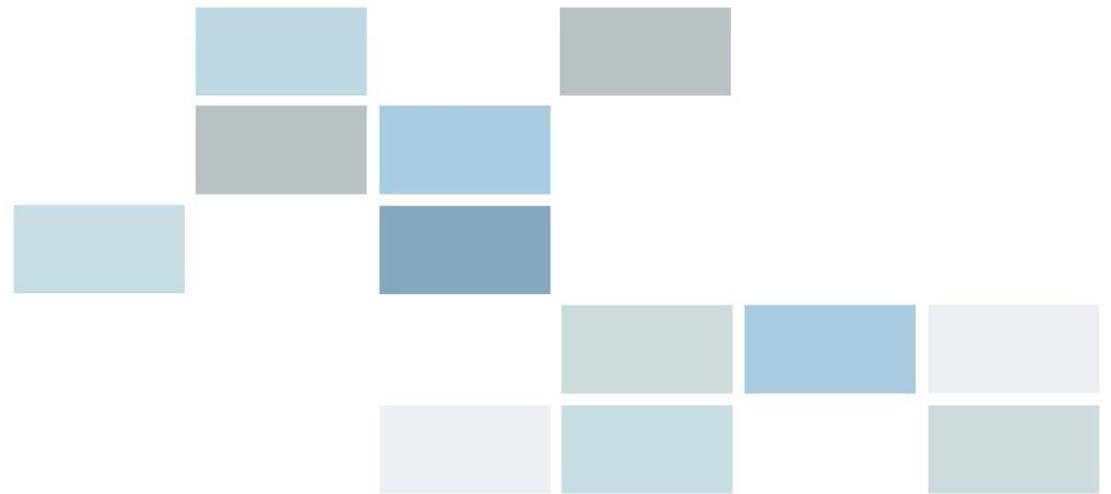
Energy Efficiency & Renewable Energy, continued

- ✓ “To me, it [energy efficiency] makes a big difference, not because I’m going to save a lot of money right now, but it makes a difference because I think it’s going to protect me in the long run. I signed up for this program because I’m looking down the road, gasoline is getting scarcer, oil is getting scarcer and the prices have to go up.” (Marlton, 6 pm)
- ✓ [Regarding Energy Efficiency] “To me, it’s more important, personally, it’s more about money. You save money. I mean, and secondarily it’s the environment, because everybody is, you know, doing little about it or maybe not. But for me, personally, it’s more important for me to be saving the money.” (Marlton, 6 pm)
- ✓ [Motivations for clean energy or energy efficiency] “Reduce reliance on foreign oil.” (Marlton, 6 pm)
- ✓ “Economics would be, I think, the main reason; saving money, especially in this day and age.” (Marlton, 8 pm)
- ✓ “Also the environment, less impact. I mean every little bit helps.” (Marlton, 8 pm)
- ✓ “It’s about a quality of life.” (Marlton, 8 pm)
- ✓ “It’s [Energy Efficiency] where we need to go, and we’re not getting there fast enough.” (Marlton, 8 pm)
- ✓ [Most important aspect] “I think it would be dependence, the dependence of foreign supply, If we were able to come up with any renewable sorts to self-sustain within this country, it would save money if the supply and demand. So you have that one, and it does save money.” (Marlton, 8 pm)

Energy Efficiency & Renewable Energy, continued

- ✓ “I think cost is important, but as I look at the whole picture, I think there is so much waste out there in the world. I think if everybody was just a little bit more conscience, there would be a lot less waste and everybody’s cost would go down.” (Edison, 6 pm)
- ✓ “I would say primarily cost, and secondarily would be the dependence on foreign oil.” (Edison, 6 pm)
- ✓ “Well, the savings, we wanted to be energy efficient so that we’re not spending more money than necessary for the things that we’re using. And why have we not done anything about it is because it costs money to do that. So you have to kind of weigh how much you’re going to save to how much you have to put out in order to save. “ (Edison, 8 pm)
- ✓ [Regarding Energy Efficiency] “Just the growing awareness of the green – you know, the renewable energy and not just burning it up.” (Edison, 8 pm)
- ✓ “If it [Renewable Energy] was cost efficient, you’d get more people involved. Right now, it’s not.” (Edison, 8 pm)
- ✓ “One thing that they haven’t mentioned yet that I think is - but is more a personal thing - is feeling good internally about doing something good for the rest of the people because if you start – if you save energy, if everybody saved energy, the price will go down, supposedly.” (Edison, 8 pm)

State Role



State Role

Residential customers question whether the State's efforts are as well-designed and productive as they could be.

- Awareness of the role played by the State of New Jersey was quite low in these groups, even among NJCEP program participants.
- Consumers did not recognize that energy efficiency and clean power are important State goals, or see New Jersey as a leading state in these areas.
- Consumers were not able to name any NJCEP programs, including the ones they had participated in themselves. When shown a lengthy list of program names (Edison groups only) they did not object or find the names confusing, but they still showed no sign of recognizing the names of the programs they had been part of.
- The consumers also were not aware of broader State initiatives, such as 20% by 2020 or the Energy Master Plan. They did not feel that energy is an important concern for Governor Corzine, or that he is showing strong leadership on efficiency and clean power.
- Edison residents were not aware that their county is a partner community.

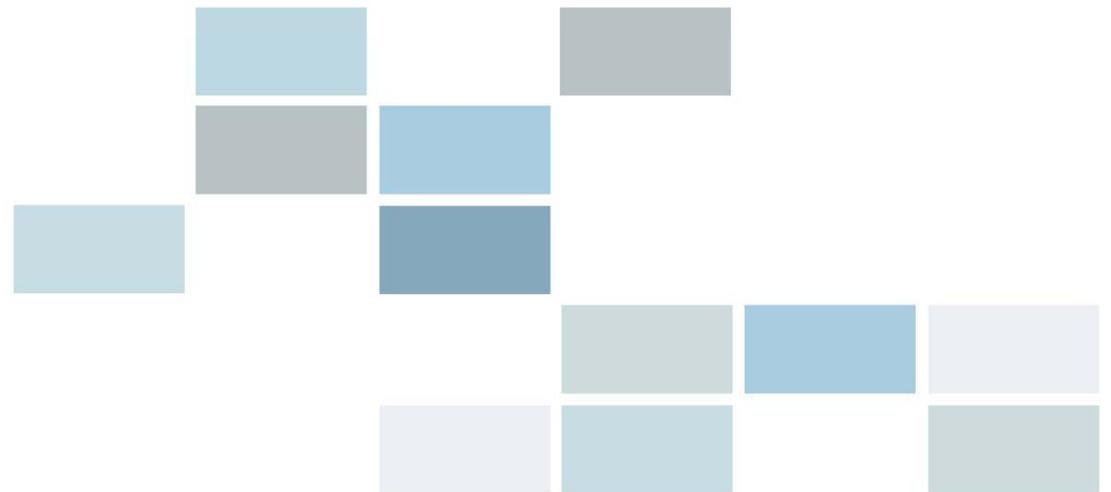
State Role, continued

- ✓ “I heard about like things on the radio saying about air conditioners and stuff like that, rebates, but I think that they should publicize it more because I don’t think that a lot of people know about it, as much as they could.” (Marlton, 6 pm)
- ✓ [Regarding Governor Corzine’s role] “He is too busy keeping the state from going bankrupt.” (Marlton, 6 pm)
- ✓ “My question would be, does he [Governor Corzine] want people to know? Because as more people know they may get more involved. Like these different programs, how do you know unless you actually go and do the research to find out about what different programs are out there? I think if there were more notification, more information, it would help a lot. Now, of course, cost is going to be the driving factor, but if you see that you can save money then, of course, the result is going to help the environment.” (Marlton, 6 pm)
- ✓ [Regarding local community’s involvement] “Not unless it’s election time.” (Marlton, 6 pm)
- ✓ [Regarding local community’s involvement] “It’s not the most enlightened community.” (Marlton, 6 pm)
- ✓ “I think there needs to be more – it needs to be advertised more. More people out there need to know, you know, what’s available, maybe the benefits from it, just an overall – more of awareness.” (Marlton, 8 pm)
- ✓ [Regarding Governor Corzine’s role] “Given the revenue needs of the state, I’d have to assume it’s on the backburner. It’s not a high-priority item.” (Marlton, 8 pm)

State Role, continued

- ✓ “When the state gets involved I think they do things that sometimes are very wasteful. They may look at a program that they feel will be beneficial, but spend a whole lot of money on it, and then our taxes are going to go up. So I don’t know. Again, it all depends on the motivation, the reason of doing it, if it’s what the majority really wants to see. I don’t know, but what are they doing?” (Edison, 6 pm)
- ✓ [Regarding Governor Corzine’s role] “Actually, all I hear about is the budget, so I don’t really know if he’s expressed anything in the papers recently about any kind of environmental impact.” (Edison, 6 pm)
- ✓ “Yeah, I don’t think it’s really out there much. You know, I don’t really hear much. I don’t see much. I think I saw something in my electric bill one time about the rebate and the incentives and all that, but otherwise, I don’t think it’s really out there for many people to see the good in doing it and buying these type of appliances.” (Edison, 8 pm)
- ✓ [Regarding the 20% by 2020 plan] “Is that a wish or is that a mandate? Seriously, is it a wish we can do it by 2020 or is the government saying, “We’re mandated that we’ve got to cut 20 percent by 2020?”” (Edison, 8 pm)
- ✓ “If the state is so concerned – okay? You don’t hear them talking about doing anything at the Statehouse. We’re talking about controlling our property taxes. Well, let’s put some solar panels on our schools if the state really cares.” (Edison, 8 pm)

Marketing Communications



Marketing Communications

Residential Energy Efficiency Programs - Family (radio, print, brochure)

- The family orientation was well-understood and well-received.
- The campaign was seen as providing a lot of valuable, clear information in digestible form, with a clear call to action.
- There were favorable comments on the organization of the brochure, which makes it easy to find specifics of interest.
- The inclusion of do-it-yourself “tips” received a number of favorable comments.

- ✓ “This is much easier to just – to read. It’s categorized. It has all the information. I just think it’s laid out better.” (Marlton, 8 pm)
- ✓ “And this one even has tips that you can follow to help. Even if you don’t make the call, these are things that you can do without even instigating a call.” (Marlton, 8 pm)
- ✓ “I like this residential flyer, how it gives you different things you can do without spending the money upfront, you know, lowering your hot water heater to a different temperature and taking – tips.” (Edison, 8 pm)
- ✓ “I think it’s better if they gear towards the family because that’s something that you can take charge of, and too, if you’re saying that we’re going to do this as a community, that means that people have to step up, some people don’t step up, and you don’t have control of that.” (Edison , 8 pm)

Marketing Communications, continued

Home Performance with Energy Star (TV, radio, print)

- There was a positive response to the idea of using smart tools and techniques to identify the best opportunities to save energy throughout the house.
- Considerable concern was expressed about the cost and objectivity of the contractors. Many felt the audit/inspection should be free or provided at very low cost, and that contractors could be too interested in finding expensive things to do.
- For some, the availability of “low-interest financing” suggested high cost.

- ✓ “I thought the message got across pretty clearly that doing these improvements to your home will save energy and save money. Combining some of the commercials together, some seemed to be focused more on cost savings, some on energy savings, but the message was pretty clear.” (Marlton, 6 pm)
- ✓ “So, you know, like how much is it? Is it free or is it a fee, a small fee, or, you know, it needs to be – I think that needs to be added to it. Because if I’m trying to save money, if I don’t have any money, and the first thing you are saying is call a contractor, and he’s going to tell me I need some more money, I’m not going to call.” (Marlton, 6 pm)
- ✓ “So, I’ve got to pay a guy with low income financing? That can’t be cheap. And you are only saving me 30 percent, it didn’t really talk about helping the environment any. So, that wouldn’t key into me, even though that is something that is important to me, but, you know, you are saving 30 percent, but it’s costing me \$1,000 just for the guy to come out.” (Marlton, 6 pm)

Marketing Communications, continued

Home Performance with Energy Star (TV, radio, print)

- ✓ “I was neutral because I was a little bit confused about, like I said, like who exactly is it, like they are referring you to different contractors, are these private contractors, are these people who work for the state? Like there is just some confusing things about it.” (Marlton, 6 pm)
- ✓ Well, you got to be careful with these contractors because they have biases. They have their own agenda. A guy comes in and says, “Hey, this is bad, this is bad, it’s got to be replaced. I want the job.” (Marlton, 8 pm)
- ✓ “I think they have to make it clearer that this is going to be a program that’s going to be accessible to everybody, even those who are going to be financially – have difficulty, as opposed to, you know, people who obviously are making a good income and can afford the upgrades and things or can afford the audits.” (Marlton, 8 pm)
- ✓ “It showed to me that they would be doing it in a very professional and efficient manner.” (Edison, 6 pm)
- ✓ “I thought in general everything caught my eye. I liked seeing what will be done, but then even when it came up in blue on the screen, anytime I see low-interest financing, it’s like it’s got to be ten grand because how else would you pay for it? So that was the only thing I did not like, that little blurb.” (Edison, 6 pm)
- ✓ “Right, and that probably would deter me from doing it because contractors vary. One guy will charge you who knows.” (Edison, 6 pm)
- ✓ “That gave me the sense that they were going to send people out to try to sell me stuff.” (Edison, 8pm)

Marketing Communications, continued

Whole House/Whole Community (print)

- There were many favorable comments about the use of real people in a variety of situations. This approach was strongly preferred to the “celebrity endorsement” by Kevin O’Connor, who was recognized by only a few.
- There were also favorable comments about the diversity of the people and situations shown in the ads.
- Some commented that, seen individually, each of the real people ads might catch the interest only of people in situations similar to the one illustrated, i.e., new home buyer, senior citizen, etc.
- Some objected to the amount of information/small type in the ads.
- The “community” aspect of the ads was not spontaneously talked about. When it was brought up by the moderator, the rationale for including it seemed unclear and not compelling.

- ✓ “Yes, the personalization, I think, helped to get a little bit more, “This is a real life experience.”” (Marlton, 6 pm)
- ✓ “I missed the message, except for those words, “Whole community”, I didn’t see anything in the text that referred specifically to community.” (Marlton, 6 pm)
- ✓ [“The checklist is what made it for you?”] “Yes, I didn’t know who that guy [Kevin O’Connor] was.” (Marlton, 6 pm)

Marketing Communications, continued

Whole House/Whole Community (print)

- ✓ “Having the presence of real life people, I think, helps.” (Marlton, 8 pm)
- ✓ [Regarding the “real people”] “It adds credibility, I think, to it.” (Marlton, 8 pm)
- ✓ [Regarding Kevin O’Connor] “I want to see real people.” (Marlton, 8 pm)
- ✓ [Regarding the slogan] “The slogan and the message are not related enough that they hook you. I’m sort of reading the rest of it, and I quickly felt myself losing interest pretty quickly.” (Edison, 6 pm)
- ✓ [Regarding Kevin O’Connor] “I don’t think he’s recognizable enough for people to really, like, catch their eye, this particular guy.” (Edison, 6 pm)
- ✓ “If you’re looking at this as a campaign, it actually does a few things. You’ve got an older house there, the new that – but you’re also looking at different ages, different ethnic backgrounds, which is going to appeal to people. You have Asians, you have the black, you have the white, you don’t have all male, you don’t have all female, and you’re talking all different races, genders and ages, and that’s what you really need in a campaign. You can’t just have one spot.” (Edison, 8 pm)
- ✓ “If you’re looking at a marketing thing, it’s a whole thing. You got old to new, and you don’t have just white people, black people, Asian people. It’s ages and it’s a mixture of people, and that’s what you want to see in today’s society. You don’t want to see just one person.” (Edison, 8 pm)

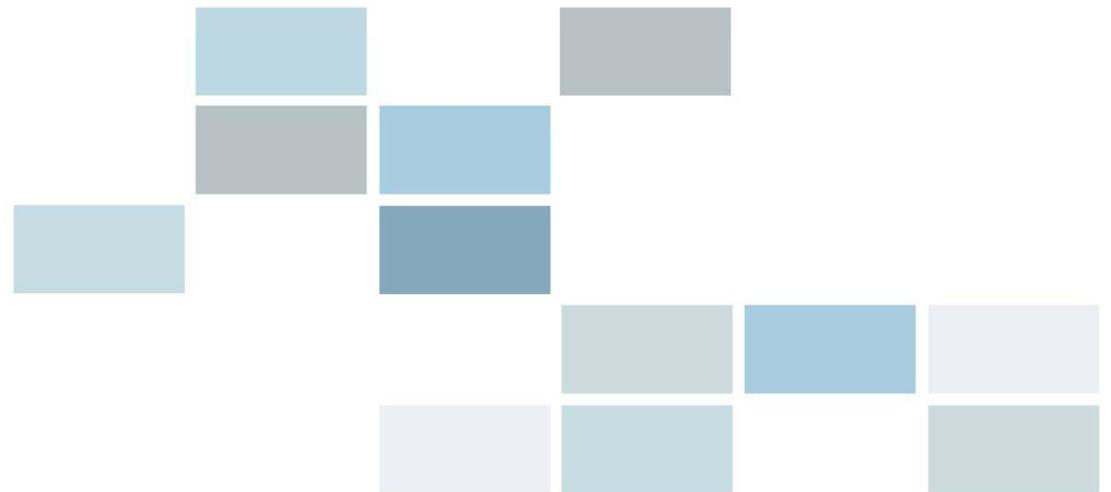
Marketing Communications, continued

Residential Energy Efficiency Programs – Community (radio, print, brochure)

- This campaign was seen as providing valuable, clear information in digestible form, with clear call to action.
- However, the “community” connection did not come across in any clear or compelling way. Consumers had trouble seeing/understanding the connection to their community.
- There was a clear preference for the “family” approach to talking about these programs.

- ✓ “It’s community involvement, that is what I’m seeing as the message. I just didn’t really hear anything specific, I guess.” (Marlton, 6 pm)
- ✓ “I don’t think using the community is – as an attractor would work, because usually everyone is about self, what can I do to save my money, my own money, what can I do to help my own self.” (Marlton, 6 pm)
- ✓ “It’s concise. It’s one page. Everything’s there.” (Marlton, 8pm)
- ✓ “I don’t get it. Save energy, save money is great, but throughout your whole community ? Why do I care?” (Edison, 6pm)
- ✓ “I barely know my neighbors. I’ve been there four years. I only know two people next to me, so you really don’t have that. I’m not saying not every town. Some towns might still have that community feeling, but not everywhere.” (Edison, 8 pm)

Program Value Propositions and Attributes



Summary of Participation Ratings

Value Propositions	Tuesday March 18 6:00pm Marlton	Tuesday March 18 8:00pm Marlton	Wednesday March 19 6:00pm Edison	Wednesday March 19 8:00pm Edison	Total
Home Performance with Energy Star					
Very likely	1	2		2	5
Somewhat likely	5	6	2	5	18
Neither likely nor unlikely		1	3	3	7
Somewhat unlikely			2		2
Very unlikely	2		2		4
Already participating/already adopted	2		1		3
Energy Star Products					
Very likely	4	6	4	7	21
Somewhat likely	2	2	2	2	8
Neither likely nor unlikely	2	1	2		5
Somewhat unlikely	1			1	2
Very unlikely					0
Already participating/already adopted	1		2		3
HVAC Program					
Very likely	1		4		5
Somewhat likely	4	7	3	4	18
Neither likely nor unlikely	1		1	2	4
Somewhat unlikely	1	1		2	4
Very unlikely	1			1	2
Already participating/already adopted	2	1	2	1	6
New Jersey ENERGY STAR Homes					
Very likely	3	2	4	6	15
Somewhat likely	3	5	2	3	13
Neither likely nor unlikely	1	1	2	1	5
Somewhat unlikely	1	1	1		3
Very unlikely	2				2
Already participating/already adopted			1		1
Clean Power Choice					
Very likely	5	3	1	1	10
Somewhat likely	1	1	5	3	9
Neither likely nor unlikely		2	1	3	7
Somewhat unlikely	2	1	1	2	6
Very unlikely	2	1	2	1	6
Already participating/already adopted		1			1
Number of Participants	10	9	10	10	39

Five program descriptions were provided and evaluated during each group. Likelihood-to-participate ratings are summarized in the table at left.

[Complete descriptions and responses to written questions about each program are included in the Appendix.](#)

The value propositions were reviewed by each group in the following orders:

Marlton, 6 PM & Edison, 6 PM:

1. Home Performance With Energy Star
2. Energy Star Products
3. HVAC Program
4. New Jersey Energy Star Homes
5. Clean Power Choice

Marlton, 8 PM:

1. Clean Power Choice
2. New Jersey Energy Star Homes
3. HVAC Program
4. Home Performance With Energy Star
5. Energy Star Products

Edison, 8 PM:

1. HVAC Program
2. New Jersey Energy Star Homes
3. Energy Star Products
4. Clean Power Choice
5. Home Performance With Energy Star

Energy Star Products

The program's primary attraction is long term savings; however, there is some skepticism regarding the higher upfront costs when purchasing Energy Star products.

- ✓ Twenty-one said they were “very likely to participate,” eight said “somewhat likely.”
- ✓ Key positives included energy efficiency and helping the customer make informed decisions.
- ✓ Roadblocks include higher upfront costs and trusting the retailer.

- ✓ “It helps the environment.” (Marlton, 6 pm)
- ✓ “It is something we all – most people have heard of already and it’s something that, like, if you are in the store, you are probably looking for it, so it’s not like, you know what I mean?” (Marlton, 6 pm)
- ✓ “Initial cost. I mean, buying a new washer, dryer, refrigerator and stuff, clean energy. I mean, if you are going and you already have to buy one, I mean, it’s only a couple hundred dollars, you make it back. But, otherwise, you are not going to go out and buy a new refrigerator because you think you are going to save a couple of dollars.” (Marlton, 6 pm)
- ✓ “As Energy Star pops up, you begin to identify that as a label or a brand that you like.” (Marlton, 8 pm)

New Jersey Energy Star Homes

The appeal of the program centers around taking advantage of an opportunity to improve energy efficiency all at once. Some are concerned about the associated cost.

- ✓ Fifteen said they were “very likely to participate,” 13 said “somewhat likely.”
- ✓ Key positives include energy efficiency, cost savings, independent testing, and improved resale value of the energy efficient home..
- ✓ Roadblocks include the cost, the fact that it only applies to those in the market for a new home, and reservations about who exactly will be testing/verifying the energy savings.

- ✓ “Well, it’s good if you are moving into a new house anyway.” (Marlton, 6 pm)
- ✓ “Of course, you know, your upfront costs may be higher, the energy costs are going to be lower, but then another benefit is probably the resale value of the property. It’s going to be higher than it would if you just had the less efficient appliances, less efficient furnace and stuff like that.” (Marlton, 8 pm)
- ✓ “Yeah, verification that the house is efficient. If I’m going to be spending that much money to buy a new house, I want to make sure it’s efficient.” (Edison, 6 pm)
- ✓ “It says it’s the health and safety. Those kind of keywords kind of stood out for me.” (Edison, 8 pm)

Home Performance With Energy Star

The program's positive attributes include potential cost savings and a reduction in energy consumption. There is apprehension concerning the potential upfront cost and whether contractors will be out to help consumers or help themselves.

- ✓ Five said they were “very likely to participate,” 18 said “somewhat likely.”
- ✓ Key positives include cost savings, saving energy, a comfortable environment and the use of accredited contractors.
- ✓ Roadblocks include the cost, and uncertainty about whether contractors are working in the homeowner's best interest.

Home Performance With Energy Star, continued

- ✓ “I would do it to increase savings and comfort.” (Marlton, 6 pm)
- ✓ “Increasing your home’s value.” (Marlton, 6 pm)
- ✓ “Like the actual home improvements that you have to make, it’s going to cost a lot.” (Marlton, 6 pm)
- ✓ “Yes, financing means banks and banks charge interest.” (Marlton, 6 pm)
- ✓ “I guess the question with that would be are they really finding issues or are they finding just many, many upgrades that they’re going to recommend to you” (Marlton, 8 pm)
- ✓ “I really think that that [the cost] needs to be specific, before you have someone come in your house, that you can choose to — before you commit to having the work done.” (Edison, 6 pm)
- ✓ “Either provide a free home assessment or inform the consumer exactly what the assessment cost would be.” (Edison, 6 pm)
- ✓ [Positive] “Healthy and safe living environment.” (Edison, 8 pm)
- ✓ “It’s still a business for somebody. Something like this should be a nonprofit.” (Edison, 8 pm)

HVAC Program

The potential cost savings are attractive to some, but others are skeptical about the cost of the program and whether contractors can be trusted.

- ✓ Five said they were “very likely to participate,” 18 said “somewhat likely.”
- ✓ Key positives include improved efficiency, cost savings and comfort.
- ✓ Roadblocks include the cost and lack of trust in participating contractors.

HVAC Program, continued

- ✓ “The efficiency of it.” (Marlton, 6 pm)
- ✓ “Using the program is more likely to get quality installation.” (Marlton, 6 pm)
- ✓ [Disadvantage] “To get that third party verification. You already sent a qualified guy to my house and then you’ve got to send another qualified guy? I don’t understand that.” (Marlton, 6 pm)
- ✓ [Disadvantage] “Well, just the cost of contractors.” (Marlton, 6 pm)
- ✓ “It just sounds like the most reasonable thing to do.” (Marlton, 8 pm)
- ✓ “Well, it’s also comfort, maybe make you a little warmer in your house and cooler in the summer.” (Marlton, 8 pm)
- ✓ “You really can never 100 percent trust a contractor, so you have a third-party come in and independently verify that it’s the right size and everything. It’s probably a good start to keeping a contractor more honest.” (Edison, 6 pm)
- ✓ [Disadvantage] “Cost versus return on investment.” (Edison, 6 pm)
- ✓ “Just going through that program, you know, the quality installation where it has all the – they follow a set of rules that that program provided. That would be a positive.” (Edison, 8 pm)

Clean Power Choice Program

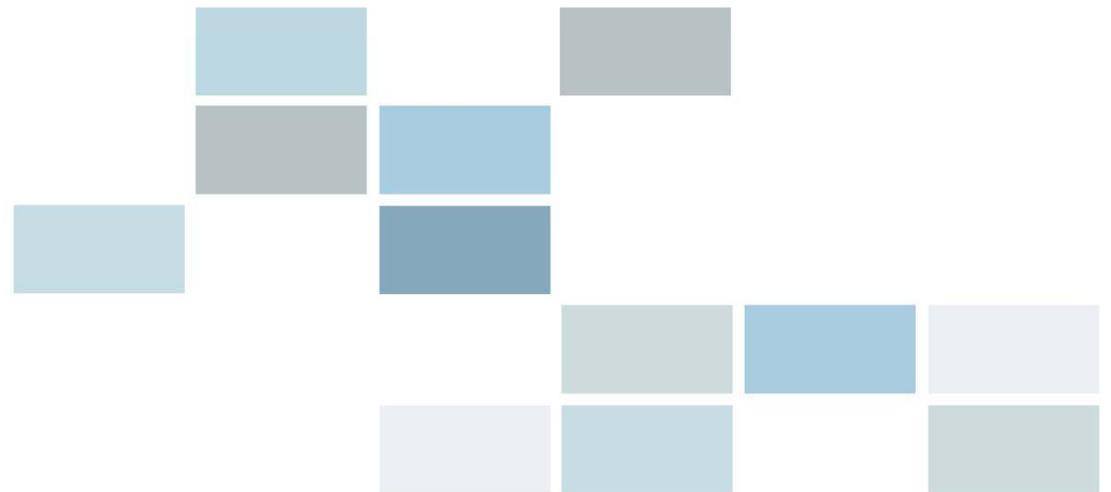
There are some strong positive sentiments regarding the environmental benefits. The cost incurred to participate is the key drawback. Some wanted more explanation of the long-term plan and benefits of the program.

- ✓ Ten said they were “very likely to participate,” nine said “somewhat likely.”
- ✓ Key positives include supporting renewable sources and benefits to the environment.
- ✓ Roadblocks include the cost and assurance that you will benefit from the investment.

Clean Power Choice Program, continued

- ✓ “I limit my reliance on something I have no control over, foreign oil. I don’t know how bad it’s going to get, but that is just one little thing that I can do to cut that chain.” (Marlton, 6 pm)
- ✓ “It supports and encourages the use of renewables and hopefully, public awareness of that resource.” (Marlton, 6 pm)
- ✓ “It’s an alternative energy source. You know, along with your financial incentives, I think the alternative energy sources right now are very important.” (Marlton, 8 pm)
- ✓ “I’d like to see them actually show something tangible. Like, they have plans, they are going to do this in this area, and I’d like to see the transparency. I don’t want to start giving money every month, and then, you know, two years down the road, “Oh well, we have a budget crisis, and we need the money for something else.” Sorry, but that’s just – that’s a big problem for me.” (Marlton, 8 pm)
- ✓ “I look at it for my kids, too, though. I’m looking for at least we’re heading down the right road, heading in the right direction for the kids.” (Edison, 6 pm)
- ✓ “But the downside is how much and when. Am I going to pay \$20 for the rest of my life and never see any of this come to fruition?” (Edison, 6 pm)
- ✓ “And depending on how much. Like you said, if it’s 10 to 20 dollars, I don’t think so. Maybe five dollars or less, I would participate.” (Edison, 8 pm)

Communication Channels

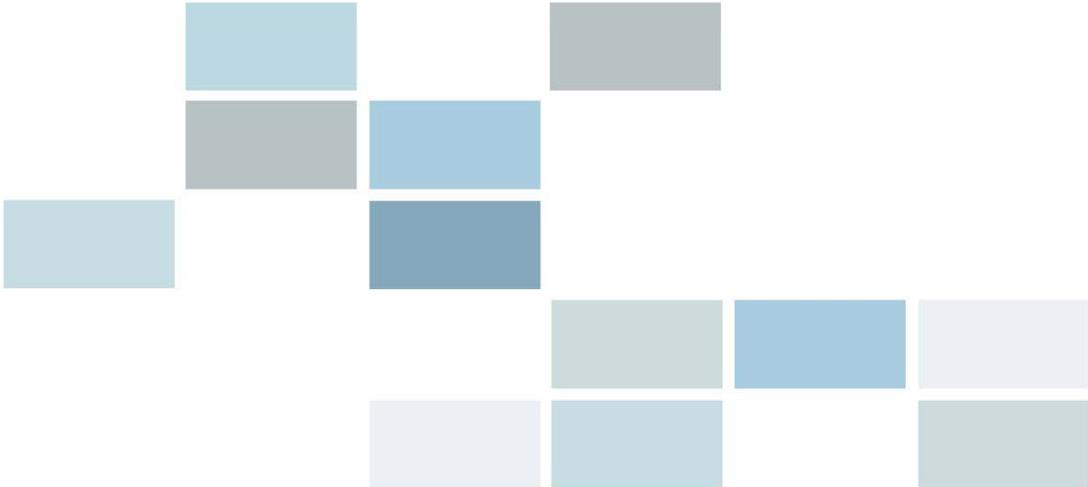


Communications Channels

- Consumers indicated that television advertising would be the most effective approach for increasing the awareness and interest of the general public. Other media suggested were radio, newspapers, billboards, direct mail and home shows. There were few mentions of Internet/online communications.
- Nevertheless, all of the program participants indicated that they became involved not through any type of media exposure, but rather through third party influence: trade allies or retailers made them aware of the program benefits available to them.

- ✓ “My impression is that the print advertisements didn’t go over too well, because they get crumpled up and thrown in quite a few trash cans or recycling bins.” (Marlton, 6 pm)
- ✓ “Like I said, some information is better than no information. Right now, there is like no information. Not unless you go to look for it.” (Marlton, 6 pm)
- ✓ [How he became aware of the program] “Yeah, so when the contractor finished up, he had the rebate form for the New Jersey Clean Energy and had some contact numbers and a website. So I went to the website because I’d never heard of it and was curious. So I learned a lot about it by looking at their website.” (Marlton, 8 pm)
- ✓ “I think initially the biggest step with awareness is through television.” (Edison, 6 pm)
- ✓ “I think I would listen better if it [means of communication] was local.” (Edison, 8 pm)

Appendix - Group Material and Respondent Profiles



Discussion Guide

2008 Residential Customer Focus Groups Moderator's Guide

Objectives: To better understand NJ residents' needs, awareness, attitudes and perceptions about energy efficiency, renewable energy, the role played by the State, NJCEP programs and communications. To investigate the role of the Partner Community program in shaping these views.

INTRODUCTION (5 MINUTES)

- Moderator welcomes the participants and familiarizes them with the focus group rules and facility (e.g., no right or wrong answers, microphones, videotaping).
- Participants introduce themselves: First name, where they live, have/have not been involved in energy efficiency or renewable energy programs with the NJCEP.
- Moderator introduces topic: Here to talk about NJCEP's programs and services. We'll be talking about existing programs and some possible new ideas, and getting your thoughts and reactions. What's good about them, what's not so good, what would make them better?
- Your ideas will be very valuable to us, so input from all sides is encouraged, although I may need to keep us on track from time-to-time.

DISCUSSION OF ENERGY EFFICIENCY AND RENEWABLES (15 MINUTES)

Objectives: To better understand people's needs, awareness, attitudes and perceptions about energy efficiency and renewable energy. To identify opportunities to encourage more people to make investments in energy efficiency and clean energy.

Probe for: (1) Steps they are taking to improve efficiency and/or use of clean energy, (2) Participation in efficiency or clean power programs, (3) Installation of renewable energy technology (i.e., solar panels).

We have a diverse group of people around the table, with different levels of interest and involvement in these topics. So, to start, let's have a discussion of why energy efficiency matters to you and your family and community.

- Is energy efficiency important, or not so important? Why?
- How important?
- Why? What does it mean for you and your family? How do you benefit?

[Capture on flip chart reasons why energy efficiency is important. Then, show of hands to indicate which three reasons are most important.]

- Does it mean anything for your community? What/why?
- Have you already taken steps to increase efficiency? [If necessary, provide thought-starter examples: lighting, heating, cooling, water heating.]
 - What kinds of steps?
 - With what results?
 - Do you plan to do more?
- Have you set goals to improve efficiency? What are they?
- Have you run into any roadblocks or things have not worked out as planned in trying to be more efficient? What are they? Why is that a problem?
- What would help people in NJ make faster progress toward using energy efficiently?

Let's switch gears a bit and talk about renewable energy or clean power. So now the question on the table is why it matters or doesn't matter whether the electricity used in your home comes from clean, renewable sources, such as solar power or wind.

- Is using renewable energy important? Why?
- How important?
- Why? What does it mean for you and your family? How do you benefit?

[Capture on flip chart reasons why clean energy is important. Then, show of hands to indicate which three reasons are most important.]

- Does it mean anything for your community? What/why?
- Have you already taken steps to increase your use of clean energy?
 - What kinds of steps?
 - With what results?
 - Do you plan to do more?
- Have you set goals to increase your use of renewable energy? What are they?
- Have you run into any roadblocks or things have not worked out as planned in trying to use renewables? What are they? Why is that a problem?
- What would help people in NJ make faster progress toward using more clean, renewable energy?

STATE ROLE (10 MINUTES)

Objectives: To understand their knowledge and attitudes about state sponsorship of programs, and what they feel the role of New Jersey's state government should be.

Probe for: Positives and negatives. Language used in discussing state's role. Consensus on how state could/should help them.

OK. We've been talking quite a bit about conserving energy and using cleaner energy. Now I'd like to talk a bit about how you feel about the role the State of New Jersey is playing in these efforts.

- What is the state doing about energy efficiency and renewable energy, that you may have heard about?

Discussion Guide

- Give me the names of any state programs you've heard about that support energy efficiency and renewable energy. [WRITE ON FLIP CHART.]
- Discuss programs respondents are aware of or have participated in, and what they know about them.
- Which do you think are the most effective programs? Why? What are the benefits?
- Which are less effective, why? What are the problems?
- What would make the programs more useful to you and your family? What else?
- In general, how could the state provide more help to people like you? What should they do differently? Why?
- Check awareness for Energy Master Plan, 20% by 2020, Governor Corizne role, community leaders/group roles.

MARKETING COMMUNICATIONS (40 MINUTES)

Objectives: Gauge receptiveness to current and potential future message strategies and communication concepts.

Probe for: Words and concepts that work / words and concepts to avoid.

Now I'm going to ask you to look at some information that is being used, or might be used, to let people know about energy efficiency and renewable energy programs in New Jersey. This includes various types of advertising and communication materials, which I'm going to ask you to review and evaluate with me...

[PLAY/SHOW/HANDOUT ALL MATERIALS.]

For each set overall:

What is your initial reaction to what you are hearing/seeing? Is your reaction:

Positive?

Neutral? [SHOW OF HANDS – RECORD ON FLIP CHART.]

Negative?

All right, why? Explain to me why you have the reaction you do.

[Get positive, neutral and negative input, probing on:

- Credible/not credible. Why?
- Interesting and invites further curiosity, or dull and easy to ignore?
- Clarity of message – what is it trying to get across?
- How relevant is it to you, personally? How could it be more relevant?
- What are they asking you to do?
- How would you improve it?
- What additional information would be valuable useful?
- Community/social vs. individual/family motivation

- Third party endorsement (Kevin O'Connor) or real people?
- Does state sponsorship affect your feelings about these messages? In what way? Why?

PROGRAM VALUE PROPOSITIONS AND ATTRIBUTES (30 MINUTES)

Objectives: Understand specific likes and dislikes with respect to current programs and offers. Identify and understand key motivating factors for participating, as well as roadblocks to participation. Explore levels of interest in current and potential future program designs/design elements. Understand the decision-making process people use to determine whether to participate in energy efficiency and clean energy programs.

Probe for: Opportunities to encourage more people to make investments in energy efficiency and clean energy. What are the emotions behind motivations?

Thanks for telling us what you think about these materials. This is great information. Now I'm going to hand out several program descriptions so we'll all have exactly the same information about each program, and ask you to jot down answers to a few questions about each one. Then we'll discuss them as a group. Some of them are existing programs and others are new ideas.

Moderator hands out first program description/value proposition and asks participants to read it and answer the questions below it. [SEE SEPARATE DOCUMENT]

Discuss/probe program value propositions and attributes.

- Is your family likely to participate? Why/why not?
- What do you like about this program?
- Why might you want to participate? What are the key benefits? What would make it better?
- What do you dislike about it?
- What would stop you from participating? How can that be overcome? Why would that matter?
- [For existing programs] Why did/didn't you participate? (Lack of awareness? Other roadblocks?)
- What if we tweak the program in this way [describe better incentive, lower price, etc.]? Would that increase your likelihood to participate? Why/why not?

[HAND OUT EACH PROGRAM DESCRIPTION IN TURN, AND FOLLOW THE SAME PROCESS. PROGRAMS WILL BE DISCUSSED IN A DIFFERENT, RANDOM ORDER IN EACH GROUP.]

[AFTER GOING THROUGH ALL DESCRIPTIONS] Alright, let's try to wrap up and summarize the discussion we've been having. Based on everything we have talked about:

- What are the program features and benefits that really matter to you? What characterizes a program you would really want to get involved with?
- OK, and how would you characterize a not-so-attractive program, one you would be likely to stay away from?
- What would make you more likely to make future investments in energy efficiency or renewable energy?"

Discussion Guide

COMMUNICATION CHANNELS (10 MINUTES)

Objectives: Explore which channels/communication vehicles will work best to communicate residential program benefits.

Probe for: Key media and other communications channels; specific publications, websites, conferences, etc.

Our next topic is how best to communicate with people like you. For those of you who have participated in programs or at least were aware of them, how did you learn about the programs? For those who have not yet been involved, how can NJCEP do a better job of reaching out to you?

- Through third parties/trade allies. Which ones took the lead?
- Media: which ones?
- Websites: which ones?
- Retailers: which ones? How communicated?
- Trade shows/conferences/events: which ones?
- Directly from NJCEP. Advertising, direct mail, website, other?

If you were working for the NJCEP, what methods would you use to get the word out about programs and services offered to people like you?

WRAP UP (5 MINUTES)

OK, fine. Those are all the topics we wanted to cover with you tonight. But I would like to ask each of you to make a final comment.

Based on your feelings when we started and everything we have talked about tonight, what are your feelings now about these types of energy efficiency and renewable energy programs?

Will the information we have discussed tonight make you more or less likely to get involved in these types of programs in the future? Why/Why not?

What did you learn that made you change your opinion?

Thank participants and remind them to collect incentive checks.

Value Proposition Handouts

Home Performance with Energy Star

This comprehensive home improvement program can help reduce your home's energy usage by up to 30%, create a more comfortable, healthy and safe living environment, and lessen the impact of global warming. Home improvement services are provided by Accredited Building Performance Institute (BPI) contractors, who are specially trained and certified.

Low-interest financing and cash-back incentives are available on eligible measures.

1. How likely would you be to participate in this program?

- Very likely
- Somewhat likely
- Neither likely nor unlikely
- Somewhat unlikely
- Very unlikely
- Already participating/have already adopted these measures

2. What is the best feature of this program, from your point of view?

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Energy Star Products

The Energy Star program makes it possible for your local retailer to help you select lighting, appliances, windows and home electronics with the Energy Star label, which use less energy without sacrificing comfort or style.

1. How likely would you be to participate in this program?

- Very likely
- Somewhat likely
- Neither likely nor unlikely
- Somewhat unlikely
- Very unlikely
- Already participating/have already adopted these measures

2. What is the best feature of this program, from your point of view?

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Value Proposition Handouts

HVAC Program

When it's time to upgrade or replace your heating and cooling equipment, it is important to select a high efficiency system -- sized and installed properly by a competent contractor. Through the HVAC program, quality installation is available, with verification by an independent third-party, for central air conditioning systems to make sure your system is installed correctly. Duct sealing services are also available to help improve your home's air distribution system for greater efficiency and even temperatures from room to room. In addition, maintenance service programs are available to help make sure your equipment is properly maintained for optimal performance.

1. How likely would you be to participate in this program?

- Very likely
- Somewhat likely
- Neither likely nor unlikely
- Somewhat unlikely
- Very unlikely
- Already participating/have already adopted these measures

2. What is the best feature of this program, from your point of view?

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

New Jersey ENERGY STAR Homes

If you're building a new home, be sure to ask your builder for a New ENERGY STAR Home—built for superior energy performance, comfort, health and safety.

Through the New Jersey Energy Star Homes program, these homes are independently tested and verified to use 15-35% less energy than conventional homes.

1. How likely would you be to participate in this program?

- Very likely
- Somewhat likely
- Neither likely nor unlikely
- Somewhat unlikely
- Very unlikely
- Already participating/have already adopted these measures

2. What is the best feature of this program, from your point of view?

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Value Proposition Handouts

Clean Power Choice

By participating in this program, you can invest in the production of clean energy.. For a few dollars more each month, you'll be investing in the generation of solar, wind and other renewable energy sources.

1. How likely would you be to participate in this program?

- Very likely
- Somewhat likely
- Neither likely nor unlikely
- Somewhat unlikely
- Very unlikely
- Already participating/have already adopted these measures

2. What is the best feature of this program, from your point of view?

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Home Performance With Energy Star

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Very likely

2. What is the best feature of this program, from your point of view?

Discussion of options available to me, points of references for me to pursue, new tool to save energy (money).
Comprehensive savings, lessen global warming, financing and cash back.
Reducing energy usage overall. (2)
Accredited by BPI contractors.
I like all the features.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Low interest financing-cost?
Contractors even though they are trained and certified.
None-I won't need each program at once, but it is nice to know they exist.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Encompass apartment dwellers.
Make it mandatory for all homeowners to have their homes assessed for free. Then offer options on how to implement the program into everyone's home.
Maybe give a dollar amount to include a guaranteed percent off your utility bill. Incentive.
Publicize it more. Make me aware of what is available to my family.

Home Performance With Energy Star

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Likely

2. What is the best feature of this program, from your point of view?

Cost savings. (4)

Saving energy.

Helps me and the environment.

Tells you what might be wrong and why your house uses so much gas and electric. I personally would want to find out why I'm using so much electric.

Energy savings and comfort level of home.

Low interest financing and cash back. (2)

Energy/cost savings.

Financial incentives. Accredited contractors.

Reducing energy usage overall. (2)

Reduce homes energy usage by up to 30%; comfortable, healthy, safe living.

Properly trained and certified.

Trained and certified people.

(Reduce usage by 30%.)

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Contractor cost.

Cost.

Have to use certain contractors.

How much is it going to cost?

Money.

Low interest financing-cost?

Contractors even though they are trained and certified.

Home Performance With Energy Star

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Likely (*continued*)

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Make it mandatory for all homeowners to have their homes assessed for free. Then offer options on how to implement the program into everyone's home.

Maybe give a dollar amount to include a guaranteed percent off your utility bill. Incentive.

Real references of people who used it and saved on energy and energy costs. Also need a timeline. It is 30%/year? How are contracting costs offset.

Allow for the home owner to do upgrades.

Have to be a free check and how much is it going to cost me.

Do it ourselves.

New Jersey should pay for these changes to be made.

Make all contractors independent.

Make it non-profit.

The people overseeing it should be environmentalists.

Rebate to refund the assessment.

Home Performance With Energy Star

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Neither Likely Nor Unlikely

2. What is the best feature of this program, from your point of view?

Comfortable, healthy and safe environment. (2)

Identify the energy waster in the home, therefore save money.

To reduce my home energy overall cost by 30% is phenomenal. To feel like I can create a comfortable environment for me and my family is great as well.

Certified contractors.

Can decrease homes energy usage by up to 30%. Features are great. (2)

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Have one.

Now knowing the evaluation cost.

The hidden underlying cost that can be involved. The financing scares me and I would put it off for something else that needs to be worked on in my home.

Available on “eligible” measures.

Not guaranteed to reduce the homes energy usage. Don't know if contractors are overcharging and for telling you things that need to be improved just for their profit.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

How-tos.

I would gladly have an evaluation if I knew what the cost was.

Free home assessment on the first visit.

Tell prices, who are the contractors?

Home Performance With Energy Star

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Unlikely

2. What is the best feature of this program, from your point of view?

30% reduction of energy usage.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

I have a newer home that was built with Energy Star principles. High efficiency heating and cooling, tight duct work, and high insulation and new windows.

Low-interest financing and eligible measures, not guarantees.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Provide an average savings.

Home Performance With Energy Star

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Very Unlikely

2. What is the best feature of this program, from your point of view?

Cutting energy usage.

Can improve a home's value.

Identify way(s) that my house is not being efficient.

Accredited contractors.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

There is a cost somewhere.

Cost of updating. Is it really worth it? New Jersey isn't collecting my money the power company and contractors are.

The cost-it is unknown.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

What can be done without spending money?

Provide a free home assessment-or, inform the customer exactly what the assessment cost would be.

I don't know enough about the program.

Home Performance With Energy Star

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Already Participating/Adopted

2. What is the best feature of this program, from your point of view?

Comfort of home.

Making people aware of energy waste.

Big picture-anything and everything helps.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Using Accredited Building Performance Institute. It sounds like a scam business association.

Expense of hiring pros.

Overall cost to others-a loan is a loan.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

I like the program just not the BPI thing. Possibly a list of what improves your energy usage by percentage.

Offer free or low cost energy audits.

Energy Star Products

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Very likely

2. What is the best feature of this program, from your point of view?

A knowledgeable contractor would advise you about repairs that you are about to make anyway. You will listen!

Someone is informing me.

More information accessible to consumers at retail locations.

Helps weed out the bad products and directs you to more energy efficient faster. Helps save the environment and money.

Save money, thank you retailer-your choice.

Energy and cost savings without sacrificing.

My choice when I shop. Advice that I can learn and use.

No obligations.

Energy efficient appliances. Uses less energy. Cost effective.

Efficiency/save energy. (4)

Getting help from a qualified person.

Energy Star label.

Save me money in the long run.

Without sacrificing.

Local retailer shows products.

Local retailer.

Long-term savings.

You can be guided by someone who knows his stuff if you didn't do your own research.

Energy Star Products

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Very likely *(continued)*

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

It will cost more upfront.

Local retailer helps determine.

More cost.

Initial cost of replacing currently functioning equipment.

Additional cost.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Distrusting sales people: are they just trying to sell a high price item based on its energy star rating or is it actually as good as they say?

Sometimes reading the tags is a little confusing.

Provide more facts as to how you pick these things.

Promote benefits.

Don't know complete program.

Use standard.

Check cost with other retailers.

Add the environmental benefits.

Advertise why the additional costs and how you will move that back in your utility bills!

Energy Star Products

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Likely

2. What is the best feature of this program, from your point of view?

Simple, known, something you're seeking already.

I think when a sales person is trying to sell I don't trust him. I'm not sure if he is telling the truth or just wants to make a sale.

Have option to accept or decline (retailer). Retailer may be in a position to point out rebate candidates.

As an informed customer, my local retailer will provide alternatives.

Energy Star label for different areas in my home where I can save. It's a first input to someone who is more knowledgeable than my estimated guess.

Retailer can explain the benefits and knows the productions (pros/cons).

Retailer.

Reduction of energy use.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Who makes evaluations to certify the product.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

What's the cost/benefit ration?

Place it in my bill.

This gives you choice, most direct way of knowing your cost.

Government interaction.

Energy Star Products

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Neither Likely Nor Unlikely

2. What is the best feature of this program, from your point of view?

- Newer electronics.
- Someone to help you get what you need.
- Maybe provides some guidelines that can be used as reference points.
- To inform me of my best options.
- Knows the product savings over the year.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

- Define Energy Star.
- Affording to get the products you need.
- Are the numbers/ratings legit?
- Would I be bound or obligated, in any way, to use this particular retailer.
- No money.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

- Define Energy Star standards.
- Wouldn't change anything.
- Free home evaluation.

Energy Star Products

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Unlikely

2. What is the best feature of this program, from your point of view?

Saving.

You can visit the local store in your town.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Would only replace the above if the one I had was broken beyond repair.

The retailer can offer expensive appliances etc. that you do not necessarily need just to make a profit.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Help the environment.

Have these appliances etc. certified through the Energy Star program. Then have a star or some type of code on these items so when people go shopping they can look for the star and not worry about if the store is just trying to sell you the most expensive items for a profit.

Energy Star Products

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Already Participating/Adopted

2. What is the best feature of this program, from your point of view?

Helping the environment.

State of the art, best in class appliances.

Anything and everything helps toward the big picture.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Initial cost.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

None, you're giving a rebate for buying something you already use.

HVAC Program

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Very likely

2. What is the best feature of this program, from your point of view?

Qualification of the contractor.

Heating and cooling efficiency reduce costs and create less waste of energy.

Process and verification of installation. Additional duct sealing service –explains what benefits will be received.

Outside help.

Installation, duct sealing, air distribution-even temperature and efficiency, maintenance service program.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

None-not knowing who the contractor is.

I already had this done and have the maintenance service as well.

Cost.

Don't know entire program particulars involving costs.

What is the difference in cost?

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Make the qualification of the individual known generally so we can look for him specifically when the need arises.

HVAC Program

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Likely

2. What is the best feature of this program, from your point of view?

Saving money.

“When it’s time to upgrade” and energy efficiency.

I don’t want to be stuck with just the person that installs the equipment.

Efficiency and work done.

Comfort, cost savings.

Energy efficient. Comfort of new appliances, more efficient.

Third party independent inspection. Common sense. (3)

Comfort and savings.

Cost.

A professional and competent contractor will be performing the work.

The installation and advice from a professional, the extended service plan as well.

HVAC Program-quality installation.

Independent third party, hard to keep trust.

It will save me money in the long run.

Duct sealing services.

HVAC Program

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Likely *(continued)*

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

- Having to put out money first to save money in the end.
- Fees.
- Cost.
- How much will it cost me?
- The cost is not mentioned.
- Maintenance cost.
- Contractor may vary costs-can I trust him? All separate aspects=added costs.
- Cost.
- Initial outlay of money for replacing systems.
- Verification by an independent third party raises a flag.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

- Very low cost financing?
- Make it available for everyone.
- The cost of the plan, it should be included
- HVAC Program should have their own workers installing-not going through other outside contractors.
- Impossible.
- Include the environmental benefits.
- I would need to know who/what is behind the program, what's driving it.

HVAC Program

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Neither Likely Nor Unlikely

2. What is the best feature of this program, from your point of view?

- None/save money.
- High efficiency.
- Cost savings and comfort out home.
- Greater efficiency.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

- Need more information.
- Contractor may be assigned.
- Initial cost will be high due to owning an old house.
- Independent 3rd party.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

- Allow one to do work yourself for someone you know.
- It would have government employees that are properly trained and would eliminate any possibility of conflict of interest.

HVAC Program

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Unlikely

2. What is the best feature of this program, from your point of view?

States that when it's time to replace one can replace it with high efficiency.

They can do a lot to help make your house efficient.

The verification by 3rd party.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

I can do work myself why get a contractor?

Verification by a third party!

Doesn't tell you the price, need to be more specific.

Cost.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

State sponsor.

Add more services, provide prices and the incentives. Are there rebates or financing programs?

HVAC Program

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Very Unlikely

2. What is the best feature of this program, from your point of view?

Quality control of system/installation.

Even room temperatures.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

I'm a DIYer, cost of contractors.

Maintenance service programs=\$\$.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

A 3rd party?

HVAC Program

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Already Participating/Adopted

2. What is the best feature of this program, from your point of view?

Covers everything.

Efficiency and savings.

Independent 3rd party verification.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Having to get verification through a third-party.

System out of date when bought. Unless you need it.

Didn't know about it before hiring my installer.

Initial high cost.

General answer-Cost vs. ROI.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

None it's just cost prohibited unless you're getting a new heater/air conditioner.

New Jersey Energy Star Homes

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Very likely

2. What is the best feature of this program, from your point of view?

Independently tested.

An additional review of work to be done.

Very attractive program: getting energy efficiently for about the same cost as a conventional building.

The energy savings created by the use of efficient appliances.

Less environmental impact. More cost savings for me.

Costs would be lower. All problems with older homes would not exist due to the builders building it with total efficiency in mind.

To verify that the house is efficient.

Independently tested.

Energy efficiency.

Health and safety.

Save energy. You're starting from scratch-do it efficiently, but in the long run will it be more cost efficient?

15-35% less energy.

Cost saving.

Less energy = less monthly/annual costs.

If the home is tested and verified to be more efficient than conventional homes, then I'm going to save money in the long run.

New Jersey Energy Star Homes

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Very likely *(continued)*

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

- Personally, I'm not in the market for a new house.
- Cost of building such a home.
- Unknown cost.
- Probably cost.
- Dollar amount, 15%.
- This is only for those who are building a new home. Who is testing the homes?
- Ask builder?
- Third party test required but contractor testing.
- Do the more efficient appliances cost more to purchase?
- Who is sponsoring?

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

- Insure that contractor participants are first rate mechanics, pay them well, publicize the qualifications.
- Explain the cost.
- Lower cost overall.
- It will most likely cost more.
- Make it available to all homes and not just to those who are building a new home.
- Don't let builder determine.
- Third party test required.
- Just who is verifying and testing?

New Jersey Energy Star Homes

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Likely

2. What is the best feature of this program, from your point of view?

Same amount in the long run although I don't have to change things in an old home.

Saving/independent test.

Saves energy and money. (2)

1. Savings in my future. 2. Use less energy.

Lower operating costs. Enhanced comfort.

Cost again.

Shows percentages of savings to be gained by me. Shows benefit.

The Energy Star brand for my entire home. I trust it more.

Cost savings.

15-35% less energy.

Less energy.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Higher initial costs.

Cost.

Cost? Getting ahead of needed quality.

Have to build new.

Upfront gross cost.

Independently tested \$ cost.

New Jersey Energy Star Homes

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Likely *(continued)*

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Not enough information about the program.

I'm not buying a new home.

Verifying who certifies the home.

What is the additional cost?

Original cost.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Lower cost.

More precise information.

Fix my current home so I don't have to move.

Making it easy for everyone to get.

The cost. How much would it cost me or add to the value of my house.

Why isn't Energy Star homes mandatory?

How long will it take for return on investment?

New Jersey Energy Star Homes

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Neither Likely Nor Unlikely

2. What is the best feature of this program, from your point of view?

Energy performance, comfort and safety.

Applies to those purchasing new home leaves out large segment of the population.

Independently tested.

Saving energy.

You save money from the beginning.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Cost.

Independently tested by whom?

Can't afford to build a new home.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Encompass homes in general.

Need more information.

New Jersey Energy Star Homes

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Unlikely

2. What is the best feature of this program, from your point of view?

Using less energy.

Verified to use 15-35% less energy.

Independently tested and verified to use 15-35% less energy.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

I'm not getting a new home built in New Jersey.

New construction.

Cost.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Add "additions" to existing homes.

New Jersey Energy Star Homes

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Very Unlikely

2. What is the best feature of this program, from your point of view?

I'm not buying a new home.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Independent testing and verification.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Clean Power Choice

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Very likely

2. What is the best feature of this program, from your point of view?

Invest in my grandchildren's future.

Using renewable sources/have control.

Non-petroleum based energy better for environment.

Supporting renewable energy sources and encouraging public awareness of the need to turn to renewable

Environment-reduce need for oil.

Cost, and the health of people.

It's availability.

Financial assistance/rebates/incentives.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

None (few dollars more negligible).

More information.

Unaware of program.

Making sure it came back to my home somehow.

Cost to get it all done.

The sponsor; who will provide the work?

Unknown cost of "upgrades".

Clean Power Choice

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Very likely *(continued)*

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Insure clean energy production.

Need more information.

If it all went to North Jersey.

Make it available to everyone.

The program is relevant for me.

From state to community level.

Clean Power Choice

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Likely

2. What is the best feature of this program, from your point of view?

This is going to cost me more money and I'm trying to save.
The investing in alternative energy sources.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

The cost.
The potential of additional money to be wasted. There's no guarantee that the investment will lead to alternative energy sources.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

This is good.
They would have to give proof of investment into alternative energy sources.

Clean Power Choice

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Neither Likely Nor Unlikely

2. What is the best feature of this program, from your point of view?

Potential environmental enhancement there.
Creating more renewable energy sources.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Lack of quantifiable proof of \$ benefits.
Money.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Demonstrate more real case history benefits!
Cost more fairly spread amongst consumers. Income guidelines.

Clean Power Choice

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Somewhat Unlikely

2. What is the best feature of this program, from your point of view?

Future.

Solar, wind power-renewable sources.

It points out that I can invest in the clean energy plan, so I will benefit.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

What will the savings be? How long? Cost of living will still go up, who/what am I investing in?

Cost?? Does it exist??

“For a few more dollars”.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Make it cost effective, state supplement costs so more people do it.

Clean Power Choice

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Very Unlikely

2. What is the best feature of this program, from your point of view?

Clean energy.

I don't know enough information about the products to have an answer.

Production of clean energy.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Confusing-what is it?

Unknowledgeable about products .

Asking me for money.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Tell us what it is.

Allow me to switch to an alternative source without asking for more money.

Clean Power Choice

Transcription of Written Responses

How Likely Would You be to Participate in This Program: Already Participating/Adopted

2. What is the best feature of this program, from your point of view?

Save money and energy.

3. What is the worst aspect of this program – the biggest roadblock that might keep you from participating?

Time and money.

4. How would you change the program to make it more relevant to you and your family (other than simply increasing the incentive)?

Speed up the procedure.

Group Profiles

Recruit 13 to seat 10 per group Report date: 3/13/08	Tuesday March 18 6:00 pm Marlton	Tuesday March 18 8:00 pm Marlton	Wednesday March 19 6:00 pm Edison	Wednesday March 19 8:00 pm Edison
QA. Program Participant				
Participant: n=13 across both groups	6	7	7	7
Non Participant: n=13 across both groups	7	6	6	6
Q4. Program Interest - As falls				
Very interested	3	2	5	4
Interested	4	4	1	2
Not asked/not applicable	6	7	7	7
Q5. Energy Usage - As falls				
Natural gas and electricity	11	13	11	13
Electricity only			1	
Other	2		1	
Q7. Gender - Good mix per group				
Male	7	7	7	6
Female	6	6	6	7
Q8. Age - Good mix per group				
25-34	3	3	3	3
35-44	3	3	5	4
45-54	3	4	2	4
55+	4	3	3	2
Q9. Education - Good mix for graduated high school and above				
Grade school to some high school	2			1
Graduated high school	2	2		2
Vocational school	1	2		
Some college	4	3	3	4
Graduated college	2	4	7	4
Post-graduate degree	2	2	3	2
Q10. Household Income - Good mix per group				
<\$30k	2	1		
\$30-\$50k	3	3	2	1
\$50-\$75k	4	3	1	2
\$75k or more	4	6	10	10
Q11. Employment				
Full-time	7	8	8	9
Part-time	3	2	2	2
Unemployed		1		
Retired	3	2	3	1
Homemaker	(close)	(close)	(close)	1
Temporarily laid off	max of 3 per group			
Student				
Other				
Q13. Ethnicity				
White/Caucasian: max of 11 per group	10	10	10	10
Hispanic	1	1		1
African American	2	2	2	1
Asian/Oriental			1	1
American Indian/Native American				
Other				
RECORD NUMBER				
RECRUITED TO DATE	13	13	13	13