

# NHSaves Market Assessment

Final Report

Prepared for:



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# OVERVIEW

Navigant and Illume Advising (the research team) were hired by the New Hampshire utilities to conduct a statewide study to assess residential and non-residential customer knowledge and awareness of energy efficiency and of the New Hampshire utilities' energy efficiency program brand NHSaves®; customer attitudes and behaviors toward energy efficiency; motivations and barriers to participation in utility-sponsored efficiency programs; and effective channels for communicating with customers about energy efficiency.

The New Hampshire utilities, including Eversource, Liberty Utilities, New Hampshire Electric Co-op and Unilil have funded efficiency programs for their customers for many years and have marketed the NHSaves brand for half a decade. The primary objective of NHSaves is to increase residential and non-residential customer awareness of utility-sponsored energy efficiency programs and offerings. Messaging for both residential and nonresidential customers focuses on saving money through energy efficiency improvements and programs.

The utilities launched a significant re-design of their marketing strategy, primarily in the latter half of 2018 but wanted to capture baseline conditions as clearly as possible through this market assessment study. While some 2018 marketing effects may be captured, the following findings and recommendations primarily reflect baseline attitudes and awareness due to historical interventions.

“ If someone is not taking advantage of the program (NHSaves), they are kind of missing the boat.

- Residential customer ”

## Research Methods & Objectives

The goals of the current study were to:

1. Assess overall knowledge and awareness of energy efficiency.
2. Establish a benchmark awareness level of the New Hampshire utilities' statewide energy efficiency program brand, NHSaves.
3. Identify the means for most effectively communicating with customers and different customer segments.
4. Develop a deeper understanding of the drivers of energy efficiency participation and the barriers that impede or prevent participation.
5. Identify general attitudes, perceptions, and behaviors concerning energy efficiency.

## Data Collection Overview

Primary data collection included population surveys of residential and SMB customers, residential customer focus groups, and large commercial customer interviews.



1,072

Residential surveys:

Response rate of

11%

2

Residential customer focus groups



304

Commercial surveys:

Response rate of

4%

30

Large commercial customer interviews



## Overall Story

NHSaves brand awareness is relatively high in this baseline study among both residential and SMB customers. Nearly one-third of residential customers and almost half of non-residential customers have seen or heard the term NHSaves. Massachusetts residential customers demonstrated a similar level of baseline customer awareness of the Mass Save brand when it was measured in 2012, with 39% of customers aware of the brand.

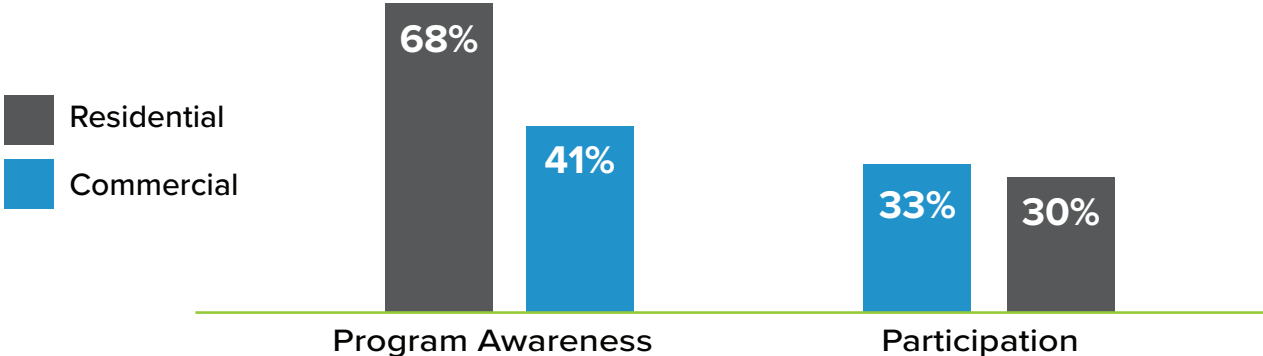
Customers who are aware of NHSaves have heard of the brand through a variety of channels, and most view the messages as clear.

Customers are generally aware of programs to help them save energy in their homes. However, many customers don't fully understand their program options, leading to a barrier to participation.

Residential customers fall into four main customer segments, with two of these segments presenting immediate opportunities for NHSaves engagement.

Large commercial customers differ from SMBs. They have more diverse energy usage needs and are motivated by unique factors such as public image, the need to appeal to certain stakeholder groups, and the need to comply with their boards of directors. Generally, these customers also trust their utility key account representatives and rely on them to learn about program offerings.

Program Participation and Awareness Levels



# Residential Specific Findings

Residential customer awareness of the NHSaves brand is relatively high in this baseline study, with 32% of customers saying they've heard of NHSaves. Customers most commonly associate the NHSaves brand with energy, rebates and discounts, and saving money.

158 telephone surveys

914 web surveys

The majority of those aware of NHSaves also associate the brand with their utility **(60%)**.

## AWARENESS

Customer awareness of NHSaves is fairly similar across utilities.

College-educated customers are more likely to be aware of NHSaves than non-college-educated customers.

## MESSAGING

Customers predominantly learn about NHSaves through programmatic-specific channels – when shopping for lighting and appliances – and also in bill inserts.

Key messaging for NHSaves appears to be resonating with customers: they associate NHSaves with energy, rebates and discounts, and saving money.

Half of customers believe that messages are clear; however, 18% said that messaging was not clear.

Nearly all respondents view NHSaves favorably.

## PARTICIPATION

The majority of customers (68%) have heard of programs to help them save energy in their homes; however, a sizable customer segment say that they have either never heard of programs or do not know what their program options are.

Among customers who are aware of programs, 31% say that they have participated in a program. Most commonly, customers participate in lighting and appliance rebate programs.

“ I wish I had known about NHSaves... because it would've been a better opportunity (for me). ”

- Residential customer



# Key Customer Segments



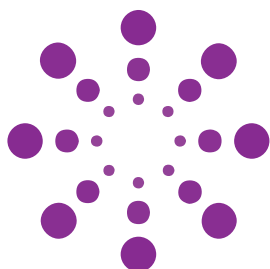
## Engaged Greens (24%)

Familiar with energy efficiency programs and know what they are. A third are also aware what NHSaves offers, and 58% have participated in energy efficiency programs. Engaged greens have the highest level of concern with environmental issues; they perceive a high level of responsibility to take action; and they frequently engage in energy saving behaviors.



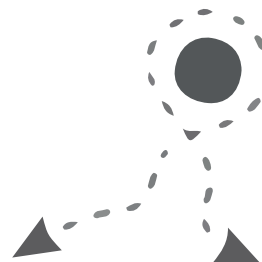
## Aspiring Greens (27%)

Have moderate levels of awareness of NHSaves, awareness of energy efficiency programs, and have participated in energy efficiency programs. Aspiring greens have high levels of concern with environmental issues; perceive a higher level of responsibility to take action; and frequently engage in energy-saving behaviors.



## Peripherally Aware (25%)

Generally aware of energy efficiency programs, but do not know about their program options, and have never participated in efficiency programs. Peripherally aware are least likely to be concerned about environmental issues, and to take responsibility to act; and they engage in energy-saving behaviors.



## Disconnected (24%)

Lower levels of awareness of NHSaves, and lower levels of program participation. Disconnected customers have a lower level of concern with environmental issues; perceive a lower level of responsibility to take energy efficient actions; and do not frequently engage in energy-saving behaviors.

Customer segments were developed using key awareness and program participation metrics, in addition to psychographic variables. Psychographic variables included: concern about environmental issues; engagement in energy-saving behaviors; and perceived responsibility to take action. Using psychographic segmentation in combination with traditional demographic segmentation can help provide detailed information on how the NHSaves brand and program offerings fit into customers' lives, and hence, how to devise marketing strategies and tactics.

# Non - Residential Specific Findings

**233** telephone surveys

**71** web surveys

## AWARENESS

Non-residential customers are more likely to be aware of NHSaves compared to residential customers. Nearly half of non-residential customers report having seen or heard the term “New Hampshire Saves” or “NHSaves.”

Nearly one-third of non-residential customers who had heard of NHSaves expressed high levels of familiarity with the brand.

## MESSAGING

Non-residential customers most commonly first learn about NHSaves from their utility (30%). A large proportion also heard about NHSaves through an advertisement (18%).

More than half of non-residential customers associate NHSaves with a way to lower energy bills (54%); followed by rebates on high-efficiency equipment and products (52%); and a resource for energy efficiency information (43%).

Despite being more aware of and familiar with the brand, non-residential customers were less likely than residential customers to be aware that their utility sponsors NHSaves.

## PARTICIPATION

Nearly half of non-residential customers are aware that there are programs to help their businesses save energy (41%); of these, approximately one-third remembered participating in one or more programs.

Customers are most likely to be aware of, and participate in, incentives for energy efficient lighting.

## WEBSITE

19% of SMB customers have visited the NHSaves website.

Half of large commercial customers have visited the NHSaves website.

“

I thought is was very unique in that it bundled the utility programs into one spot...I thought it was all-emcompassing.

- Large commercial customer

”

# Actionable Take - Aways

## FINDING 1

**NHSaves brand awareness is relatively high in this baseline study among both residential and SMB customers.**

- Double-message non-residential customers through residential marketing.
- NHSaves long history may explain high awareness levels.
- Utilize the NHSaves website to build non-residential customer relationships.

## FINDING 2

**Customers who are aware of NHSaves have heard of the brand through a variety of channels, and most view the messages as clear.**

- Leverage direct outreach by utilities to non-residential customers.
- Use the low-cost of email messaging to maximize outreach to residential customers.
- Continue to build on favorable perceptions.
- Establish the NHSaves website as an informational resource.

## FINDING 3

**Customers are generally aware of programs to help them save energy in their homes. However, many customers don't fully understand their program options, leading to a barrier to participation.**

- Improving awareness of programs is the key to increasing residential customer participation.
- Poor program experiences are not a key factor in lack of repeat smb participation.
- Continue to streamline the participation experience.
- Increase program awareness through channels other than lighting.

## FINDING 4

**Residential customers fall into four main customer segments, with three of these segments presenting immediate opportunities for NHSaves engagement.**

- Leverage psychographic and behavioral segmentation strategies to refine marketing strategies and tactics used to engage those segments. In combination with demographically-based customer segments, psychographic segments provide insight into customers lives, world views, and motivations to participate in energy efficiency programs. Using both segmentation strategies will allow NHSaves to identify customers receptive to NHSaves and develop messages they are receptive to.
- The "Engaged Greens" and "Aspiring Greens" customer segments represent immediate opportunity for NHSaves brand and program engagement.

## FINDING 5

**Large commercial customers differ from SMBs.**

- Leverage large non-residential customers' environmental motives.
- Pay attention to seasonality.
- Maximize website usability, regional connections and key account reps to reach national chains.
- Pay increasing attention to data centers.
- Be attuned to customer payback periods, planning cycles and roi requirements.
- Educational opportunities, trainings and seminars are valued by large non-residential customers.

## INTRODUCTION

This section provides an overview of the background, research objectives, and methodology used in this New Hampshire energy efficiency market assessment study by Navigant and ILLUME Advising (the research team).

### **BACKGROUND, OBJECTIVES, AND METHODOLOGY**

The research team was hired by the New Hampshire utilities to perform a statewide energy efficiency market assessment during 2018. The study was designed to assess residential and non-residential customer knowledge and awareness of energy efficiency and of the New Hampshire utilities' energy efficiency program brand NHSaves®, attitudes and behaviors toward energy efficiency, motivations and barriers to participating in utility-sponsored efficiency programs, and preferred communication channels.

The New Hampshire utilities, including Eversource, Liberty Utilities, New Hampshire Electric Co-op, and Unitil, have funded efficiency programs for their customers for many years and have marketed the NHSaves brand for half a decade. The primary objective of NHSaves is to increase residential and non-residential customer awareness of utility-sponsored energy efficiency programs and offerings. Messaging for both residential and nonresidential customers focuses on saving money through energy efficiency improvements and programs.

The utilities launched a significant re-design of their marketing strategy, primarily in the latter half of 2018, but wanted to capture baseline conditions as clearly as possible through this market assessment study. While some 2018 marketing effects may be captured, the following findings and recommendations primarily reflect baseline attitudes and awareness due to historical interventions.

We tailored multiple approaches to collect market assessment benchmarking information from the New Hampshire utilities' varied customer segments. The research team fielded general population surveys of residential and small-to-medium sized non-residential customers during December 2018 and January 2019 using a mixed-mode approach that included both telephone and web-based surveys. To gain deeper insights into residential customer attitudes and experiences, the research team also conducted online focus groups with a smaller subset of residential customers. Large non-residential customers have widely varied motivations, attitudes, and needs surrounding energy efficiency. In order to capture these differences, the team conducted in-depth-interviews with large commercial, industrial, and municipal customers.

## METHODOLOGICAL OVERVIEW

This study included a residential survey, a non-residential survey, residential focus groups, and non-residential in-depth interviews. As applicable, the research team triangulated information gathered across research methods to identify key findings.

### RESIDENTIAL SURVEY METHODS

#### SAMPLING AND WEIGHTING STRATEGY

All New Hampshire gas and electric utilities provided our team with the full residential population data. This allowed us to create a sampling approach based on the known universe of gas and electric customers in New Hampshire. We disproportionately sampled customers to ensure we obtained statistically valid survey data by utility and other segments of interest. Table 1 below shows both the target and actual number of completes and confidence precision by utility.

**Table 1. Target and Actual Number of Survey Completes by Utility**

Electric Utility	Target Completes	Target C/P	Actual Completes	Actual C/P
Eversource	200	95/07	267	95/06
Liberty	150	95/08	180	95/08
NH Electric Co-op	150	95/08	216	95/07
Unitil	150	95/08	281	95/06
Unidentified	150	95/08	128	95/09
<b>Total</b>	<b>800</b>		<b>1,072</b>	

Gas Utility	Target Completes	Target C/P	Actual Completes	Actual C/P
Liberty	195	95/07	190	95/08
Unitil	95	95/10	193	95/08
Unidentified	510	-	689	-
<b>Total</b>	<b>800</b>		<b>1,072</b>	

We calculated post-stratification weights to accurately represent the New Hampshire population in our analysis. Since there is unequal customer overlap between gas and electric utilities, we calculated our weights using the combination of electric and gas utility associated with each customer. We derived the population counts from the data provided by each New Hampshire utility after we had collated and

combined the data.<sup>1</sup> We then calculated simple weights based on the difference between the population proportion and the survey proportion. Weights ranged from a low of .187 to a high of 3.628.

**Table 2. Residential Survey Weights<sup>2</sup>**

Utility Combo	Population		Survey Sample		Survey Weights
	N	Percent	n	Percent	
E: Eversource G: Liberty	45,505	8%	45	4%	1.825
E: Eversource G: NA	355,935	60%	177	17%	3.628
E: Eversource G: Unitil	7,495	1%	45	4%	0.301
E: Liberty G: NA	34,206	6%	155	14%	0.398
E: Liberty G: Unitil	390	0%	25	2%	0.028
E: NA G: Liberty	24,777	4%	72	7%	0.621
E: NA G: Unitil	5,768	1%	56	5%	0.186
E: NH Electric Coop G: Liberty	15	0%	0	0%	0.000
E: NH Electric Coop G: NA	63,783	11%	216	20%	0.533
E: Unitil G: Liberty	7,549	1%	73	7%	0.187
E: Unitil G: NA	40,024	7%	141	13%	0.512
E: Unitil G: Unitil	8,682	1%	67	6%	0.234
Total	594,129	100%	1072	100%	

We considered adding additional weights based on demographic information to increase sample representativeness. As with most recent surveys, we observed a bias toward customers who were more educated, earned higher incomes, older, and owned homes in the residential survey responses (Table 3).

**Table 3. Demographic Differences Between Survey Respondents and NH Population<sup>3</sup>**

Income	NH Population	Survey	Difference
Under 50k	35%	26%	-9%
50k to under 75k	18%	18%	0%
75k to under 100k	14%	17%	3%
100k to under 150k	18%	21%	3%
150k to under 200k	8%	9%	1%
Over 200k	7%	9%	2%

<sup>1</sup> See Appendix for details on how we combined utility data.

<sup>2</sup> In the data provided by each utility, there were missing values for fuel types. NA stands for data not available, either because they do not have that fuel service, which is most likely the case for gas missing values, or because the utility does not have the data for that particular customer.

<sup>3</sup> NH population data based on 5-year estimates of 2017 ACS.

Education	NH Population	Survey	Difference
Some high school	7%	0.3%	-7%
High school	28%	14%	-14%
Some college	29%	22%	-7%
College Degree	22%	27%	5%
Graduate Degree	14%	36%	22%

Race/Ethnicity	NH Population	Survey	Difference
White	94%	92%	-1%
Native American	0%	1%	1%
Asian	3%	2%	-1%
Black	2%	2%	0%
Hispanic	4%	2%	-2%
Other	2%	1%	-1%

Homeownership	NH Population	Survey	Difference
Own	71%	83%	12%
Rent	29%	17%	-12%

Age	NH Population	Survey	Difference
Median age	43	58	15
% 65 or older (of 18 years or older)	21%	30%	9%

To assess whether additional demographic weighting would be useful, we tested a weighting scheme with additional weights based on income and a weighting scheme with additional weights based on education. The education weights resulted in weights too high to yield valid results. The income weights, while viable on their own, yielded very high and very low weights when combined with the utility weights listed in Table 2 above.

To test whether these additional weights provided significantly different results on point estimates for critical metrics, we conducted a sensitivity analysis by comparing survey results using the utility weights only and the combined income \* utility weights. The point estimates for NHSaves awareness and program participation each differed by less than one percentage point (Table 4 and Table 5). Since adding any layer of complexity to weights adds a profound amount of potential (and unmeasurable) error to point estimates, we chose to use the utility-only weighting scheme in our analysis. However, we recommend assessing the level of bias in any NHSaves marketing assessment survey going forward by individually assessing whether the level of response bias outweighs the need to minimize design effects and keep standard errors of point estimates low into the survey analysis.

**Table 4. Weighting Scheme Sensitivity Analysis for NHSaves Awareness**

Heard of NHSaves	Combined Weights	Utility Weights
I have heard about NHSaves and know what it is	13.0%	13.6%
I have heard about NHSaves but do not know what it is	22.2%	21.9%
I have never heard about NHSaves	64.9%	64.6%

**Table 5. Weighting Scheme Sensitivity Analysis for NH Program Participation**

Participated in an EE Program	Combined Weights	Utility Weights
Yes, in the past year	6.9%	7.2%
Yes, a year or two ago	6.5%	6.7%
Yes, more than two years ago	15.8%	16.1%
No/Not sure	70.7%	70.0%

**FIELDING METHODOLOGY**

We used a mixed-mode survey approach to ensure we obtained as unbiased a sample as possible. Our approach included:

- Mailed<sup>4</sup> and emailed invitation letters containing a web address for the survey, a description of the survey, and the potential to win one of fifty \$20 gift cards. We also provided customers a call-in number to complete the survey by telephone in lieu of completing the survey online.
- A subsequent email invitation, for customers whose emails were provided; and follow-up phone calls for non-responders.
- We invited 9,548 residential customers and obtained 1,072 survey completes for a response rate of 11%.

In total, 1,072 residential customers completed the survey, including 158 phone surveys and 914 web-based surveys.

**STRAIGHT LINERS**

Before data analysis, our research team investigated the survey data for a phenomenon known as straight lining. Straight lining happens when respondents reply similarly to survey questions without putting much thought into the questions being answered (for example, answering with the first response option for multiple survey questions).

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<sup>4</sup> We mailed approximately 3,600 customers a letter invitation and sent email/mail invitations to approximately 9,500 customers. The mailed invitations predominantly went to customers who did not have an email associated with their utility account. We mailed an invitation letter to a subset of customers with emails on file to test whether response rates to mailed invitations varied by customers who had emails on file and those who did not. We found no statistically significant differences in response rate between these two groups.



To identify straight liners, we calculated standard deviations of certain subscales in the survey. A zero standard deviation indicates a low variation around the mean and, therefore, the presence of straight lining. This is particularly noticeable with matrix questions where respondents are asked a series of questions with the same response options (e.g., Using a scale of 0 to 10 where 0 means “Not at all agree”, 10 means “Completely agree”, please tell me how much you agree with the following). A “straight-liner” will generally respond the same to the entire series of matrix questions (e.g., “Completely agree”) regardless of the question. We identified and eliminated 27 cases from the data. As such, the analysis presented here includes the responses from the 1,072 valid customer responses.

**ANALYTICAL APPROACH**

We analyzed the survey data using appropriate parametric and non-parametric statistics, such as t-tests, Analysis of Variance (ANOVAs), chi-squares, and z-tests, for proportion statistics. We also ran several exploratory factor, Chi-Square Automatic Interaction Detector (CHAID), and cluster analyses to identify trends in survey responses for residential surveys. In the body of this report, we discuss both statistically significant and, where relevant, anecdotal findings based on the residential focus groups.

To ensure valid statistical comparisons, we compared segments of interest to their statistical counterparts; for example, low-income customers to standard-income customers. We also compared emergent groups, like those familiar with NHSaves, to those who are not. This approach avoids flouting the independence of observations required to statistically assess differences among groups.

Since gas and electric utilities overlap, we cannot compare one utility’s metric to another utility’s metric. Doing so would flout the assumption of independence of observations—for example, one respondent may be a Unitil Gas and Eversource electric customer while another Eversource customer may be a Liberty Gas customer. While we do not provide statistical significance for the utility comparisons, we report descriptive statistics by utility for key metrics, such as aided awareness.

**RESIDENTIAL ONLINE FOCUS GROUP METHODS**

**FIELDING METHODOLOGY**

Ewald & Wasserman, an industry-leading survey house, conducted focus group recruitment efforts by phone. Recruitment activities included screening all potential participants to verify their eligibility to participate, and an incentive offering of \$75 per participant.

They recruited a total of 12 customers to participate in one of two focus groups held in November 2018. For the first focus group, held November 7, 2018, recruitment efforts successfully yielded nine customer recruits, of which five attended. For the second focus group, held November 8, 2018, recruitment efforts successfully yielded 10 customer recruits, of which 7 attended (Table 6).

**Table 6. Focus Group Participation Counts**

Session	Number Recruited	Number Participated
Focus Group 1	9	5
Focus Group 2	10	7
Total	19	12

ILLUME facilitated the focus groups online using a web-based conferencing platform and a focus group guide.<sup>5</sup> The research team developed the guide to facilitate study-based discussion among up to 10 participants for a duration of one to one and half hours. The actual duration of each focus group varied by the number of participants and the amount of information participants shared.

**ANALYTICAL APPROACH**

The research team analyzed focus group data using a thematic, qualitative analysis approach. The team identified common themes that emerged across focus groups and key takeaways that provide context for other study findings.

**NON-RESIDENTIAL SURVEY METHODS**

**SAMPLING AND WEIGHTING STRATEGY**

We aimed for a total of 300 non-residential small-to-medium business (SMB) survey completes, adjusting the targeted survey completes within different strata to achieve acceptable levels of confidence and precision for responses from all utility/fuel type subgroups. This required reappportioning a higher sample size to some of the smaller utilities and fuel types, as shown in Table 7.

**Table 7. Small to Medium-sized Non-Residential Survey Sampling Plan**

Utility by Fuel Type	Percent of Total Sample	Adjusted Quota	Targeted Completes	Achieved Completes	Percent Confidence/Precision
Eversource Electric	58%	38%	114	91	95/10
Liberty Electric	6%	12%	36	40	90/15
Liberty Gas	10%	12%	36	39	90/15
NHEC Electric	7%	12%	36	48	90/15
Unitil Electric	14%	14%	42	50	95/15
Unitil Gas	5%	12%	36	36	90/15
Total	100%	100%	300	304	-

Because we purposefully over-sample the smaller utility/fuel type subgroups, we apply a weighting correction in calculating overall responses to each question to be representative of the actual proportions of each group in the total NHSaves population. However, when reporting results at the utility/fuel type level, there is no need to apply any weighting correction, as the unadjusted statistics are accurate.

**FIELDING STRATEGY**

The survey was designed to take approximately 15 minutes to complete and was conducted by Ewald & Wasserman using a mixed-mode online and phone approach. Customers were contacted by phone,

<sup>5</sup> All recruited focus groups participants indicated having the necessary tools to participate including access to the internet and an electronic device with a video camera.

email, and postal mail using postcards encouraging them to participate in the online survey. Those customers who preferred phone surveys were provided that option, and the fielding team pursued a combination of online and phone survey completes to minimize bias from one or other mode. To increase response rates, survey participants were given the chance to win one of fifty \$20 Amazon gift cards in appreciation for their participation.

**COMMERCIAL IN-DEPTH INTERVIEWS**

We conducted in-depth qualitative interviews with key account customers from each utility to investigate key research questions for large, non-residential customers. The evaluation team designed a basic survey guide with questions on NHSaves brand awareness, energy efficiency behavior and attitudes, organizational structure and the energy efficiency investment decision-making process, motivations and barriers to program participation, and opportunities for program improvement. Interviews were designed to take approximately 30 minutes, though some were longer when respondents had more information to convey.

We interviewed municipal, commercial, and industrial key accounts from a full sample of key accounts provided by all utilities. Our target was 30 complete interviews, and we stratified our sample to be representative of the proportion of customers by utility/fuel-type combination. We randomized the list of key accounts provided by each utility and invited customers to participate until we had reached the quota set for each utility. We contacted the full census of key accounts provided by all utilities. We present a comparison of our target quotas with completed surveys by strata in Table 8.

**Table 8. Target and Actual Completes by Utility/Fuel Type Strata**

Utility/Fuel	Target Completes	Actual Completes <sup>6</sup>
Eversource Electric	17	16
Liberty Electric	2	2
Liberty Gas	3	3
NHEC	2	2
Unitil Electric	4	2
Unitil Gas	2	2

We summarize the resulting distribution of municipal, commercial, and industrial customer types interviewed in Table 9.

**Table 9. Disposition of Customer Types**

Customer Type	Count
State or Town Municipal/Military	3
Manufacturing/Industrial	6

<sup>6</sup> While we conducted 25 interviews, 2 interviewees had multiple utility service providers and responded with respect to both/all.

Customer Type	Count
Office/Retail/Hospitality	6
Warehouse/Distribution Center	1
Education/Hospital Campus	4
Financial/Telecom/Technology Park Data Centers	3
Other (Ski resort, cleaners)	2

Our research team targeted the person at each organization most directly responsible for managing facility energy use and making energy efficiency investment decisions and confirmed that we had reached the correct contact before beginning the interview. Table 10 provides the disposition of positions held by interviewees.

**Table 10. Disposition of Interviewee Title/Position within Firm**

Position/Title	Count
Director of Engineering	1
Electrical or Energy Engineer	2
Energy Management Director	6
Facilities Manager	7
Maintenance Manager	3
Operations Manager	4
Owner	1
Process Control Engineer	1

The basic interview guide (see Section 1.1.1.1A.4) contains questions spanning all key research areas; however, we provided interviewers with the flexibility to pursue other topics that arose and encouraged a natural conversation flow rather than strict adherence to the interview guide. This resulted in a richer set of findings and a deeper understanding of responses. Two experienced interviewers conducted all interviews and then recorded and transcribed them verbatim for analysis. We used NVivo software to analyze the data, extract key themes and patterns, and synthesize the large amount of information collected. To ensure thorough understanding and a comprehensive view of the findings, the analysis lead read every interview transcript in its entirety, noted key findings, and compared with NVivo results.

We chose in-depth interviews as the primary data collection method for large non-residential customers primarily because of their heterogeneity. Because these customers are so diverse, quantitative uniform surveys are not likely to yield as meaningful results as qualitative in-depth interviews. While we report statistics on the percent of respondents mentioning different motivations or concerns throughout our analysis of these results, it is important to view these findings from a qualitative and directional perspective, as they are—at most—based on a sample size of 25 interview responses.

## FINDINGS

This chapter describes findings from both the residential and non-residential data collection efforts. We structure our findings by five major findings.

### FINDING 1. NHSAVES BRAND AWARENESS IS RELATIVELY HIGH IN THIS BASELINE STUDY

#### ACTIONABLE TAKEAWAYS

**Double-Message Non-Residential Customers through Residential Marketing**—Higher awareness levels of non-residential customers relative to residential customers, combined with the finding of a significant number of non-residential customers believing NHSaves only serves households, suggests business customers are receiving a “double-dose” of residential plus non-residential messaging. By cross-promoting commercial programs or measures through residential marketing, NHSaves may simultaneously encourage non-residential program awareness and participation.

**NHSaves Long History may Explain High Awareness Levels**—Despite the newness of mass-marketing efforts, New Hampshire customers demonstrate high awareness of NHSaves. As a result, NHSaves may be able to expend less budget and energy raising customer brand awareness and switch more quickly to focusing on achieving deeper customer understanding of and familiarity with NHSaves offerings.

**Utilize the NHSaves Website to Build Non-residential Customer Relationships**—Non-residential customers show high awareness and engagement with the NHSaves website, and generally had positive feedback. Over half of large non-residential customers not only knew of the website but had used it to access information on rebates. As non-residential customers are already forming positive impressions of the website, NHSaves can build on those positive experiences to establish the website as a trusted source of energy efficiency information and resources for these customers.

*As stated by a large non-residential customer: “I thought it was very unique in that it bundled the utility programs into one spot. I thought it was a well-done website. I thought it was all-encompassing.”*

#### AWARENESS OF NHSAVES

**Residential Customers.** Nearly one-third of residential customers (32%) have seen or heard the term NHSaves.<sup>7</sup> This is the first year that researchers have measured statewide New Hampshire resident brand awareness. Massachusetts residential customers demonstrated similar levels of customer awareness of the Mass Save brand when it was first measured in 2012 (39%).<sup>8</sup>

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<sup>7</sup> Survey question: B2: Have you seen or heard the term NHSaves before today? 39%, n=340 of 1,071.

<sup>8</sup> This was an aided awareness question used in the 2012 Massachusetts Statewide Marketing Campaign. The 2010 Mass Save Residential Baseline study did not measure customer awareness of the Mass Save brand.

Awareness of the NHSaves brand varies slightly by utility, ranging from 30% for Unitil Electric customers to 37% for both Liberty Electric and Liberty Gas customers.

In addition, awareness of the NHSaves brand varied by key customer demographics. For example, more college-educated customers reported awareness of the NHSaves brand than non-college educated customers.<sup>9</sup> Further, a larger proportion of lower- and higher-income customers<sup>10</sup> indicated that they had never heard of NHSaves relative to middle-income customers (Table 11).<sup>11</sup>

**Table 11. Aided Awareness of NHSaves by Income Level**

Income Category	Aware		Not Aware		All Participants	
	n	Percent	n	Percent	n	Percent
Lower income (under \$50,000)	53	30%	125	70%	178	26%
Mid-income (\$ 50,000 - \$150,000)	153	39%	239	61%	392	56%
Higher income (over \$150,000)	34	26%	95	74%	129	18%
Totals	240		459		699	100%

Despite fairly high levels of baseline awareness, few respondents link NHSaves with a brand that promotes energy efficiency, with 4% mentioning NHSaves, unprompted, as an organization that promotes energy efficiency.<sup>12</sup> This contrasts with Massachusetts residential customers where the greatest association with Mass Save, among those aware of the brand, was energy efficiency and reducing energy bills (21%, 38 of 180).<sup>13</sup>

<sup>9</sup> College-educated: 36%, n=686, non-college educated 28%, n=339. Z-test of proportions shows statistically significant differences (p<0.001).

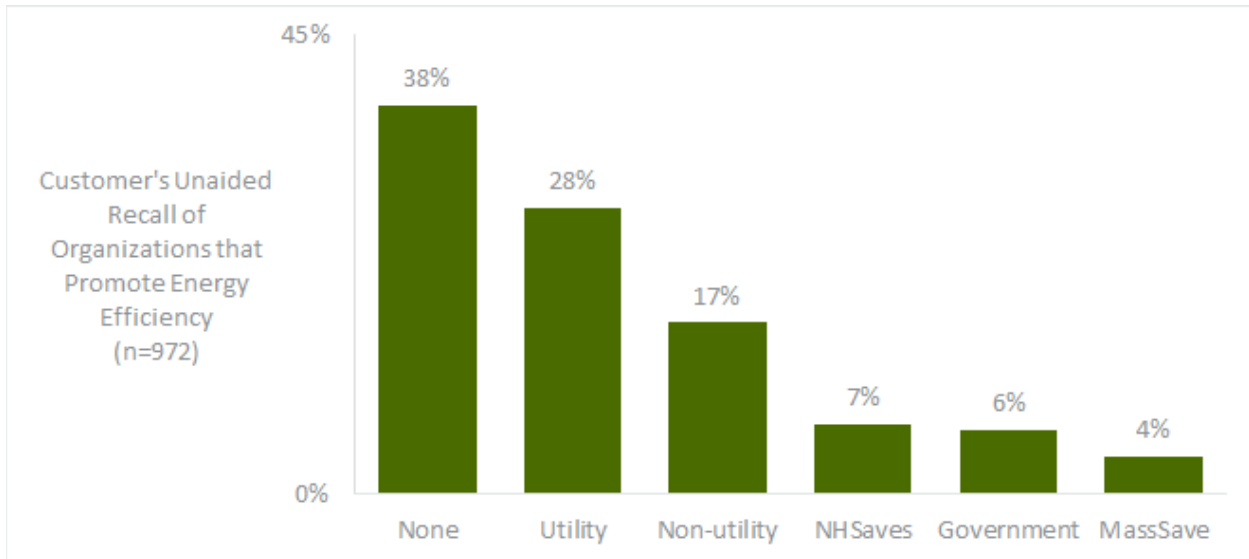
<sup>10</sup> Income brackets were determined based on a median income of \$73,381 (from 2017 American Community Survey). Lower-income households are defined as those earning 67% of the median income while higher-income households are those that earn 200% of the median income.

<sup>11</sup> Z-test of proportions showed a significant difference among the lower-income and middle-income groups as well as higher-income and middle-income groups (p=.05).

<sup>12</sup> Unaided question.

<sup>13</sup> This was an aided awareness question used in the 2012 Massachusetts Statewide Marketing Campaign.

Figure 1. Unaided Awareness of Organizations that Promote Energy Efficiency



**Non-residential Customers.** Non-residential SMB customers are more likely to be aware of NHSaves than residential customers. Nearly half of non-residential customers report having seen or heard the term “New Hampshire Saves” or “NHSaves.”<sup>14</sup> By comparison, Massachusetts non-residential customers demonstrated lower rates of baseline brand awareness relative to residential customers (33% and 39% respectively).<sup>15</sup> New Hampshire online respondents who reported awareness of NHSaves were presented with an NHSaves logo. Seventy percent recalled having seen the logo prior to the survey.<sup>16</sup> As previously mentioned, the NHSaves logo was rebranded in late 2018. This rebranding may have impacted awareness rates of the NHSaves logo among online respondents.

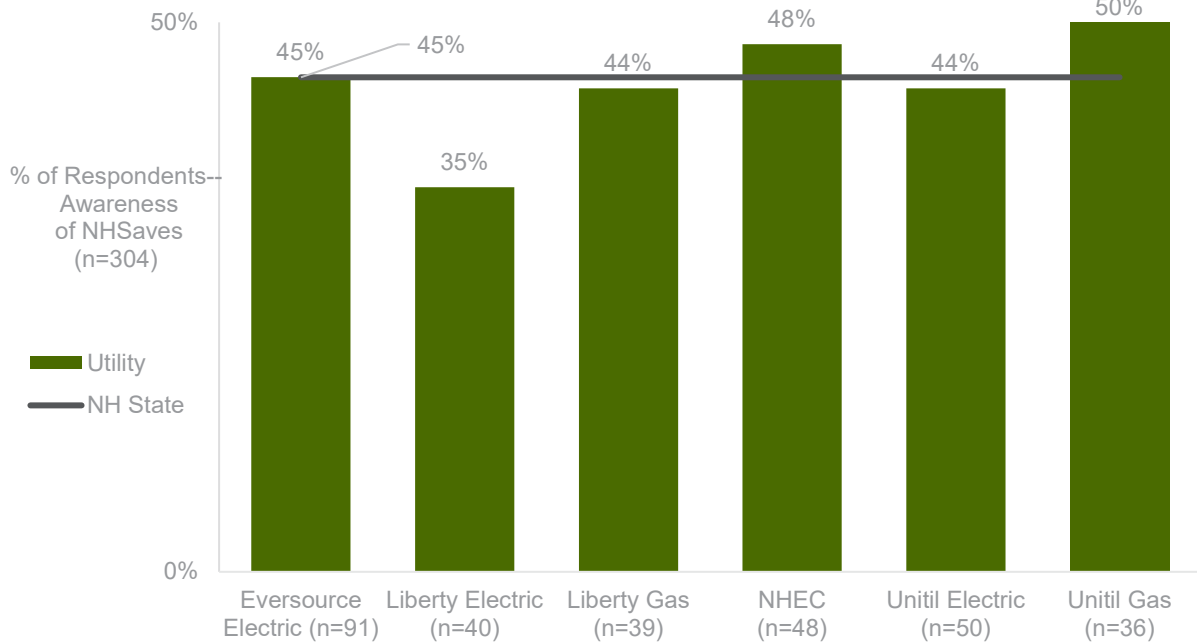
While variations in SMB awareness exist between utilities and fuel types, overall awareness values are similar. Unutil Gas shows the greatest awareness, with 50% of customers having heard of NHSaves prior to taking the survey.

<sup>14</sup> Survey question: NH1: Have you seen or heard the term “New Hampshire Saves” or “NHSaves”? 45%, n=135 of 303.

<sup>15</sup> This was an aided awareness question used in the 2012 Massachusetts Statewide Marketing Campaign. The 2010 Mass Save Residential Baseline study did not measure customer awareness of the Mass Save brand.

<sup>16</sup> Survey question: NH2: Before taking this survey, do you recall having seen this logo? 70%, n=27 of 39.

Figure 2. Percent of SMBs who Have Heard of NHSaves by Utility and Fuel Type



Through in-depth interviews, we asked large non-residential customers whether they had heard of NHSaves. Of these, 19 out of 25 (76%) said they had heard of NHSaves, compared with 45% of SMB survey respondents.<sup>17</sup> This high level of awareness among large non-residential customers may stem from having full-time employees dedicated to managing facility operations and energy usage, and these are the staff we interviewed. By contrast, many of the SMBs do not have staff dedicated to facilities and energy management and are therefore less likely to be aware. One large customer responded:

*“There [are] two major electric companies in the state of New Hampshire, and they both participate in that program. So, if someone is not taking advantage of the program, they are kind of missing the boat.”*

**FAMILIARITY WITH NHSAVES**

Brand awareness indicates how strongly a customer associates a brand with a product or service, while familiarity indicates the knowledge a customer has about a given brand. Despite fairly high baseline levels of aided awareness, residential customer familiarity with the NHSaves brand is somewhat low. This may indicate low levels of engagement with the brand. The non-residential customer segment had higher levels of brand familiarity.

**Residential Customers.** Among customers who were aware of the NHSaves brand, a minority (11%) reported that they were very familiar with the brand (Table 12).<sup>18</sup> Typically, as brands mature, and more

<sup>17</sup> The in-depth interviews were deeply focused interviews with a smaller number (n=25) of customers, so are not quantitatively comparable to the SMB survey findings, but can be compared from a qualitative, directional standpoint

<sup>18</sup> We define “very familiar” as a rating of 7-10 on an 11-point scale.



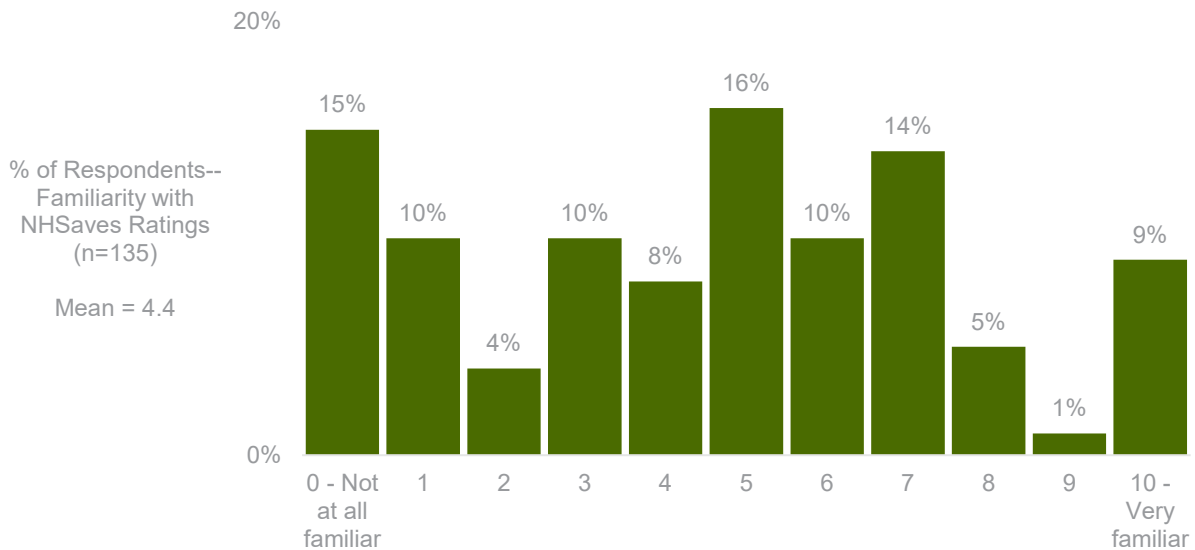
customers become aware of those brands, higher levels of brand familiarity and engagement also result. For example, in Massachusetts, baseline familiarity of Mass Save was 5% in 2010<sup>19</sup>. This increased to 6% in 2012, and has increased to 17% in 2018, corresponding to increases in overall brand awareness levels.

**Table 12. Familiarity with NHSaves Services**

Familiarity Rating	Percent of Customers <sup>20</sup>
Not familiar (0-3)	65%
Somewhat familiar (4-6)	24%
Very familiar (7-10)	12%

**Non-residential Customers.** In contrast to residential customers, a large percentage of SMB customers were familiar with the NHSaves brand. Of those who had heard of NHSaves, 29% reported being very familiar with the brand.<sup>21</sup> This contrasts sharply with Massachusetts non-residential customers where baseline familiarity with the brand was much lower; only 9% of non-residential customers reported being very familiar with the brand.<sup>22</sup>

**Figure 3. Degree of Familiarity Reported by SMBs Aware of NHSaves**



When asked whether NHSaves serves residential customers, the majority (51%) of SMBs who were aware of NHSaves correctly identified the program as serving both. A minority (13%) believed the brand only served residential customers.<sup>23</sup> This finding is consistent with the idea that non-residential customers may receive messaging through both residential and non-residential channels. Receiving

<sup>19</sup> This was an aided awareness question used in the Massachusetts statewide baseline survey in 2010.

<sup>20</sup> Total percentage may not total 100% due to rounding.

<sup>21</sup> We define “very familiar” as a rating of 7-10 on an 11-point scale.

<sup>22</sup> Massachusetts Statewide Energy Efficiency Study: Commercial Baseline 2010: Survey question: How familiar are you with Mass Save?

<sup>23</sup> Survey question NH5: To the best of your knowledge, does NHSaves offer solutions for your business, your home or both? (aided), n=135.

double-messaging might explain why non-residential customers are more aware than residential customers.

Large non-residential customers commonly reported that, while they were aware of the NHSaves brand, they were not very familiar with it. Several respondents said they were not sure if NHSaves includes commercial offerings, and that they perceive NHSaves as “more of a residential” program. Many large customers explained that, because a utility key account representative handled most of their program involvement, and they had not interacted directly with NHSaves, they were aware of the brand but did not know very much about it.

## WEBSITE AWARENESS

Website awareness and use is low to moderate, indicating an opportunity to enhance engagement with the website. Among SMB customers, 19% reported they were aware of the NHSaves website, compared to slightly less than 10% of residential customers. In late 2018, the NHSaves website was redesigned which may have impacted some respondents’ experience with the site. These levels contrast with Massachusetts residential and non-residential website awareness levels in 2012 (42% and 51% respectively).<sup>24</sup> Additionally, website use was low among both residential and non-residential Massachusetts respondents (13 each).<sup>25</sup>

**Residential Customers.** Among residential customers, 8% (83 of 1,067) report that they have visited the NHSaves website.<sup>26</sup> Of the 83 customers who have visited the NHSaves website, 77 rated the usefulness. Among these respondents, 64% (49 of 77) said the website was useful, giving it a usefulness rating between 7-10 on a 0-10-point scale. Of the 83 customers who have visited the NHSaves website, 75 provided feedback on likelihood to recommend the website. Of these, 74% (56 of 75) stated that they would recommend the website to friends and family members.<sup>27</sup>

**Non-residential Customers.** Awareness of the NHSaves website is similar across utilities and fuel types, averaging 19%. While this figure demonstrates room for growth, it also shows existing awareness of the website is robust, despite the recency of mass marketing efforts. Of those who were aware of the website, nearly half (45%) had visited it.<sup>28</sup>

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<sup>24</sup> 2012 Massachusetts Statewide Marketing Campaign Evaluation Report. The 2010 Massachusetts Statewide Energy Efficiency Baseline Study did not measure customer awareness of the Mass Save brand.

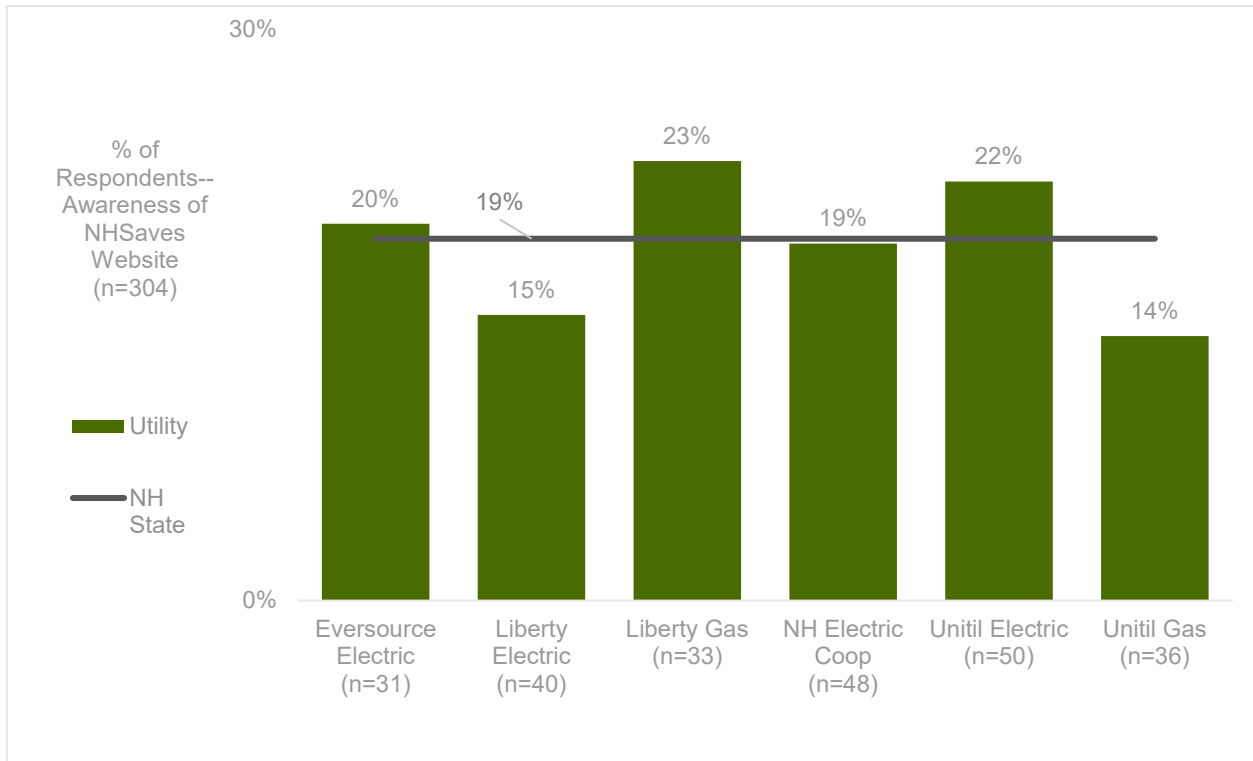
<sup>25</sup> 2012 Massachusetts Statewide Marketing Campaign Evaluation Report. Respondents who used the website visited two to five times in the last month.

<sup>26</sup> Survey question: C1: Have you ever visited the website NHSaves.com?

<sup>27</sup> Survey question: C2: On a scale of 0 to 10, where 0 means “Not at all agree” and 10 means “Completely agree”, please rate your level of agreement with the following statements: (1) The information from the NHSaves website was useful. (2) I would recommend the NHSaves website to a friend or family member.

<sup>28</sup> Survey question NHW2: Have you ever the website NHSaves.com?, n=60.

Figure 4. SMB Awareness of NHSaves Website

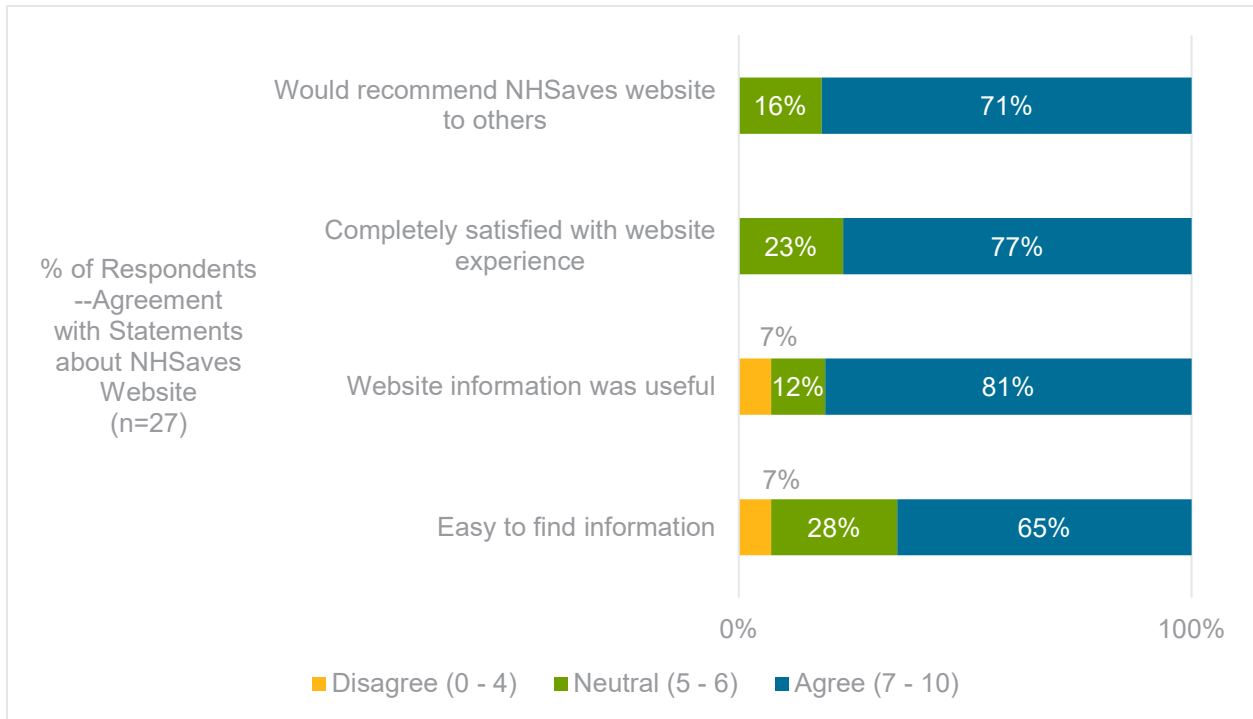


The majority of SMBs who had visited the site found it useful, easy to access information, and would recommend it to others.

By contrast to residential and SMB customers, the majority of large customers are not only aware of, but have visited, the NHSaves website (52%).<sup>29</sup> Those who had visited the site recently had positive reactions and only a few substantive suggestions for improvement.

<sup>29</sup> This finding is based on in-depth interview responses from 25 large non-residential customers, so while it is not quantitatively comparable to the SMB survey findings, it can be compared from a qualitative, directional standpoint.

Figure 5. SMB Perceptions of NHSaves Website Experience



**FINDING 2. CUSTOMERS WHO ARE AWARE OF NHSAVES HAVE HEARD OF THE BRAND THROUGH A VARIETY OF OUTREACH CHANNELS, AND VIEW THE MESSAGES AS CLEAR**

**ACTIONABLE TAKEAWAYS**

**Leverage Direct Outreach by Utilities to Non-residential Customers**—Respondents said the best way to reach facilities like theirs with information on NHSaves programs is for the utility to contact them directly, either through the mail (mailers, post cards, and bill inserts) or a phone call from their utility.

**Use the Low-cost of Email Messaging to Maximize Outreach to Residential Customers**—More residential customers chose email as their preferred method of communication relative to paper mail. This means, at a lower cost than post cards or bill inserts, utilities can reach customers via their preferred means of communication: email.

**Continue to Build on Favorable Perceptions**—Overall, customers have very favorable perceptions of NHSaves; 97% of residential respondents and 99% of SMBs had a somewhat or very favorable perception of NHSaves after hearing a description of the brand. These findings provide NHSaves with a strong baseline to build from. Rather than focusing on changing messaging, NHSaves may focus on simply increasing marketing through the methods already piloted.

**Establish the NHSaves Website as an Informational Resource**—The majority of SMB respondents who were aware of the website and had visited it did so to access rebate information. Far fewer of these customers reported visiting the site for information on energy audits or assessments, energy use tips, or other value-added purposes. Similarly, only 1% of residential customers suggested they would visit NHSaves for energy saving tips and information, versus nearly three-quarters who said they would use a general internet search. NHSaves may consider methods to establish the site’s credibility as a trusted source of energy efficiency news and information.

**WHERE CUSTOMERS LEARN ABOUT NHSAVES**

**Residential Customers.** One-third<sup>30</sup> of residential customers recall seeing or hearing some type of NHSaves outreach (Table 13).<sup>31</sup> This recall rate is similar to Massachusetts residential customers in 2012 (38%).<sup>32</sup>

Customers most frequently report hearing about NHSaves (1) when shopping for lighting, (2) in a bill insert, and (3) when shopping for appliances. Of these top three outreach channels, two—when shopping for lighting and appliances—are very program-specific, as opposed to more generalized marketing efforts.

In addition, a concerted 2018 marketing effort focused on expanding outreach via social media, including Facebook and Twitter; 12% of respondents reported hearing about NHSaves through these channels, and that figure may increase in future years’ surveys in response to the changes initiated in 2018.<sup>33</sup>

**Table 13. Residential Recall of NHSaves Outreach (Multiple Response, n=302)**

Source	Count	Percent
When shopping for lighting	168	56%
On a bill insert	162	54%
When shopping for appliances	142	47%
On a website advertising banner	72	25%
On television	70	23%
On social media	37	12%
At a community event or tradeshow	33	11%
From a contractor	23	8%

<sup>30</sup> 34%; n=340 of 1,071 respondents.

<sup>31</sup> Survey question: B2: Have you seen or heard the term, “NHSaves” before today?

<sup>32</sup> 2012 Massachusetts Statewide Marketing Campaign Evaluation Report. The 2010 Massachusetts Statewide Energy Efficiency Baseline Study did not measure recall of different marketing channels.

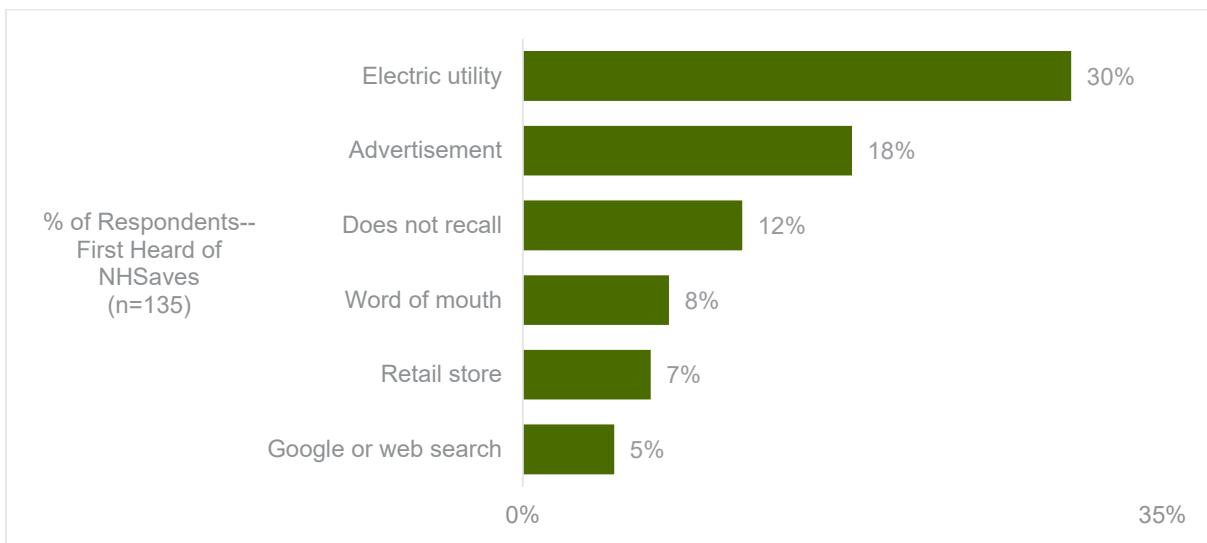
<sup>33</sup> Survey question: B5: We’re interested in all of the places where you may have heard about NHSaves, if any. Have you ever seen information about NHSaves: On television? On social media? When shopping for appliances? On a bill insert? When shopping for lighting? On a website advertising banner? At a community event or tradeshow? From a contractor?

Customers generally believe that the messages they have seen or heard about NHSaves are clear, with 52% (n=302) of residential customers saying messages are clear. However, a sizable segment of the residential population (30%) noted that they were uncertain if messages were clear, and 18% of respondents stated that messaging was not clear.<sup>34</sup>

**Non-Residential Customers**

The most common source SMBs cited for first learning about NHSaves was their electric utility (30%). A large portion (18%) also reported hearing about NHSaves for the first time through an advertisement. Not surprising given the longevity of the brand name, 12% of SMBs could not recall where they first heard of NHSaves. People who may first have encountered the brand name NHSaves 10 years ago are unlikely to remember the context in which they first heard of it.

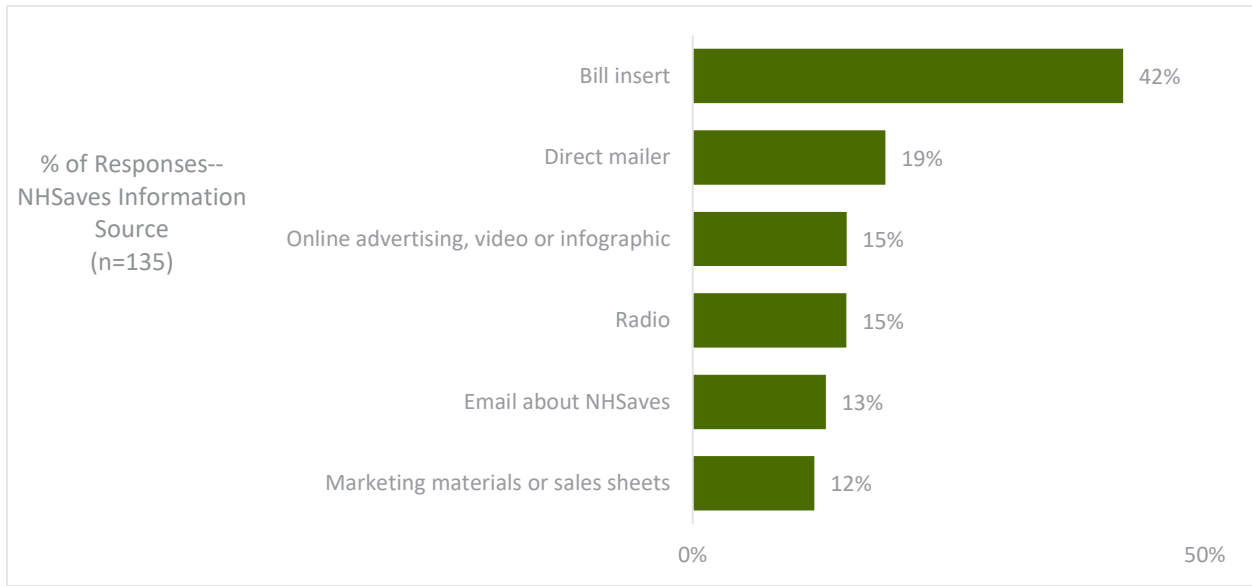
**Figure 6. How SMB Respondents First Heard of NHSaves**



We also asked SMB respondents, through an aided exercise, to identify all the sources of information on NHSaves they had encountered (not just the first). The most commonly mentioned source of information about NHSaves was receiving a bill insert, which accounted for 42% of all responses. Receiving a direct mailer, and hearing about NHSaves online or on the radio were other commonly cited sources. In line with previous findings, large non-residential customers are most likely to have heard about NHSaves through their utility key account representatives.

<sup>34</sup> Survey question: B6: Do you think the messages you saw or heard were clear?

Figure 7. All Ways SMB Customers Have Heard about NHSaves



There were some differences in responses by utility and fuel source. Liberty Gas customers were the most likely to report having received a direct mailer (41% of responses), compared with between 6% and 22% of responses from other utilities. By contrast, respondents from all utilities were roughly equally likely to report having received a bill insert. NHEC customers were the most likely to report having received an email about NHSaves (26% of responses), compared with 0 to 15% of responses for other utilities.

Respondents who reported having encountered one or more sources of information on NHSaves were asked to rate the overall clarity of the messaging they had encountered. Of these, 62% felt the messages they saw or heard were clear.<sup>35</sup>

**BRAND ASSOCIATIONS**

**Residential Customers.** Residential customers most commonly associate the NHSaves brand with energy (22%), rebates and discounts (21%), and saving money (17%) (Table 14).<sup>36</sup>

Table 14. Respondents’ Unaided Associations with NHSaves (Multiple Response, n=380)

NHSaves Associations	Count	Percent
Energy-related info	93	25%
Rebates & discounts	90	24%
Saving money	70	18%
Energy (in general)	33	9%
Lighting/bulbs	29	8%

<sup>35</sup> Survey question NH10: Do you think the messages you saw or heard were clear?; n=110.

<sup>36</sup> Among customers who report that they are aware of the NHSaves brand.

NHSaves Associations	Count	Percent
Energy audits	21	6%
Utility companies	18	5%
Energy efficiency	11	3%
Other <sup>37</sup>	69	18%

These findings indicate that key messaging for the NHSaves brand, which focuses on saving customers energy and money and directing them to energy efficiency rebates and solutions, is resonating with customers.

**AWARENESS OF UTILITY SPONSORSHIP**

Of those customers who are aware of NHSaves, a large proportion of both residential and SMB customers also associate NHSaves with sponsorship from their utility. This aligns with Massachusetts sponsorship awareness levels where the majority of residential and non-residential customers associated Mass Save with utilities or energy efficiency service providers in 2012, the first year it was measured (51% and 53% respectively).<sup>38</sup>

**Residential Customers.** Sixty percent of residential customers reported that their utility sponsors NHSaves.<sup>39</sup> Unitil Gas customers were most likely to report that their utility sponsored NHSaves (71%), while Liberty Electric customers were least likely to perceive their utility as a sponsor of the brand (57%).

**Table 15. Perceptions of Organizations that Sponsor NHSaves (Multiple Response, n=970)**

Response Option	Count	Percent
Utility company	646	60%
State Government	499	47%
Not sure	234	22%
Non-profit organization	208	19%
Federal Government	156	15%
Other	23	2%

**Non-residential Customers.** Despite being more aware of and familiar with the brand, non-residential customers were less likely than residential customers to be aware of who sponsors NHSaves (43%). Of those who had heard of NHSaves, the majority of SMB respondents (44%) were uncertain who sponsors the brand, while 39% correctly identified utilities as sponsors.

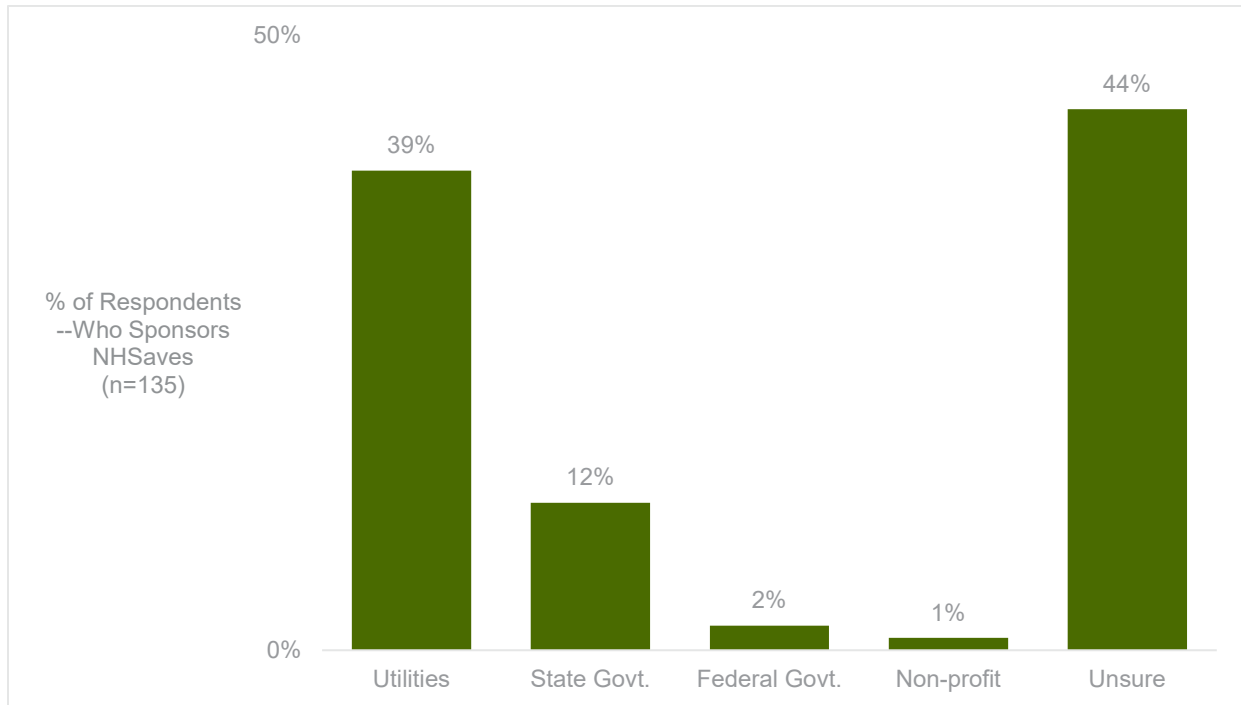
<sup>37</sup> Other responses included items such as: “Electric cars”, “Thrift store”, and “Prevent and treat opioid addiction. I thought it meant NH Saves Lives.”

<sup>38</sup> This was an unaided awareness question used in the 2012 Massachusetts Statewide Marketing Campaign. The 2010 Massachusetts Statewide Energy Efficiency Baseline Study did not measure sponsorship awareness of the Mass Save brand.

<sup>39</sup> Survey question: B9: Please name any organizations that you think sponsor NHSaves. A best guess is fine.



Figure 8. SMB Awareness of NHSaves Sponsors

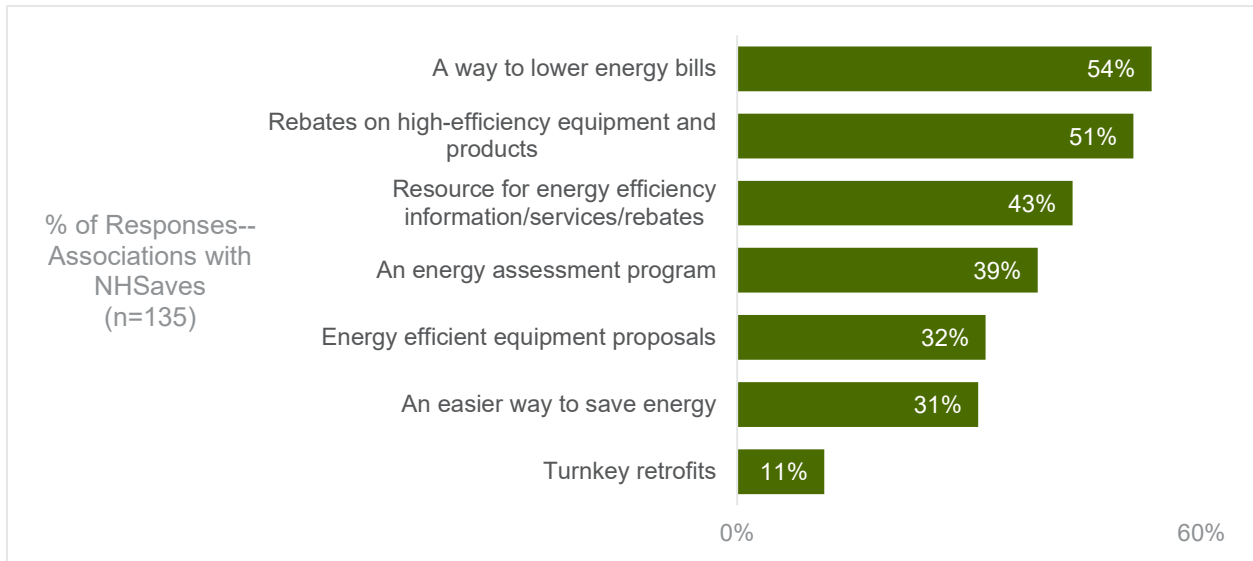


While some large non-residential customers said they believe NHSaves is sponsored by utilities, few were certain of this, and many were not sure which utilities were involved. Many large customers were uncertain whether the utilities were a part of NHSaves, whether the utilities sponsored NHSaves, or if NHSaves was a program offered by a particular utility. Many large customers cited reliance on their utility key account representatives as a reason for their lack of deeper understanding of the NHSaves brand. The following quote from a large customer illustrates this point:

*“As far as NHSaves itself, I know what the utility has relayed to me through my [key account] representative. Off the top of my head I do not know who sponsors NHSaves.”*

SMB customers were asked to identify which of the phrases presented to them they associated with NHSaves. The most commonly cited associations were lowering energy bills (54% of responses) and high efficiency equipment rebates (51%). However, a large proportion of responses (43%) associated the brand with a resource for information on energy efficiency services and rebates, suggesting that many customers perceive NHSaves as a trusted advisor.

Figure 9. SMB Associations with the NHSaves Brand



The most common associations varied considerably by utility and fuel type, which may be a consequence of the different mix of small to medium non-residential customers served by each. Liberty electric customers were more likely to cite turnkey retrofits as an association, with these accounting for 36% of Liberty electric responses, compared with 11% of overall responses. Of the Liberty gas customers, 65% associated NHSaves with rebates on high efficiency equipment, compared with 51% of responses overall. The largest share of Eversource electric customer responses (56%) associated NHSaves with a “way to lower energy bills.” For NHEC customers, the most commonly cited association was rebates on high efficiency products (57%), whereas for Unitil gas customers an energy assessment was cited most often (44%).

**NHSAVES FAVORABILITY**

**Residential Customers**

After being read or shown a description of NHSaves, most respondents report that they have a somewhat or very favorable opinion of the brand (97%).<sup>40</sup> This exceeds Massachusetts residential customers’ level of favorability (84%) when it was first measured in 2012.<sup>41</sup>

**Non-residential Customers.** After hearing about SMB customers’ innate awareness and associations with NHSaves, we provided them with the following description of the brand:

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<sup>40</sup> Survey question: C3: NHSaves is in fact a statewide energy efficiency partnership between New Hampshire utilities to provide programs for ALL New Hampshire homes and businesses to save energy. These programs include energy audits and rebates for installing energy efficient lighting, appliances, heating and cooling systems, home insulation, air sealing, and improving the energy performance of your home. Were you aware of this before today?

Survey question C4: And based on this general description, do you have a very favorable, somewhat favorable, somewhat unfavorable opinion, or a very unfavorable opinion of NHSaves?

<sup>41</sup> 2012 Massachusetts Statewide Marketing Campaign: Respondents were asked to rate their opinion, from very favorable, somewhat favorable, somewhat unfavorable, and very unfavorable, of the Mass Save campaign based on the description of the campaign. The 2010 Massachusetts Statewide Energy Efficiency Baseline Study did not measure favorability of the Mass Save campaign.

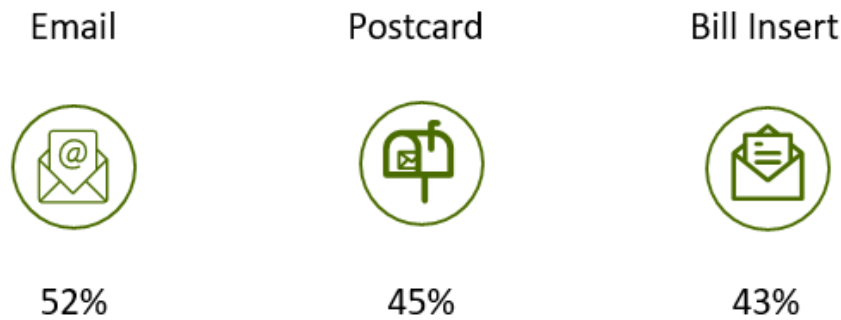
*“NHSaves is a collaboration of New Hampshire’s electric and natural gas utilities working together to provide NH customers with information, incentives, and support designed to save energy, reduce costs, and protect our environment statewide. These programs are designed to help customers save money by providing energy audits and rebates for installing energy efficient equipment.”*

After hearing this description, respondents were asked to rate how favorable their perception of NHSaves was. Favorable responses far outnumbered unfavorable responses, with only 1% of respondents reporting a somewhat unfavorable perception of NHSaves after hearing the description, 49% responding somewhat favorable, and 38% very favorable. These results suggest the NHSaves brand’s concept and purpose resonate with SMB customers. Again, these favorability levels exceed that of Massachusetts non-residential levels, when they were first measured in 2012, where 46% of respondents reported somewhat favorable and 29% very favorable.<sup>42</sup>

**PREFERRED COMMUNICATION CHANNELS AND SOURCES OF INFORMATION**

**Residential Customers.** Customers prefer to receive information about NHSaves through emails, postcards, and bill inserts (Figure 10).<sup>43</sup>

**Figure 10. Top Three Ways to Reach Customers (Multiple Response, n=1,052)**

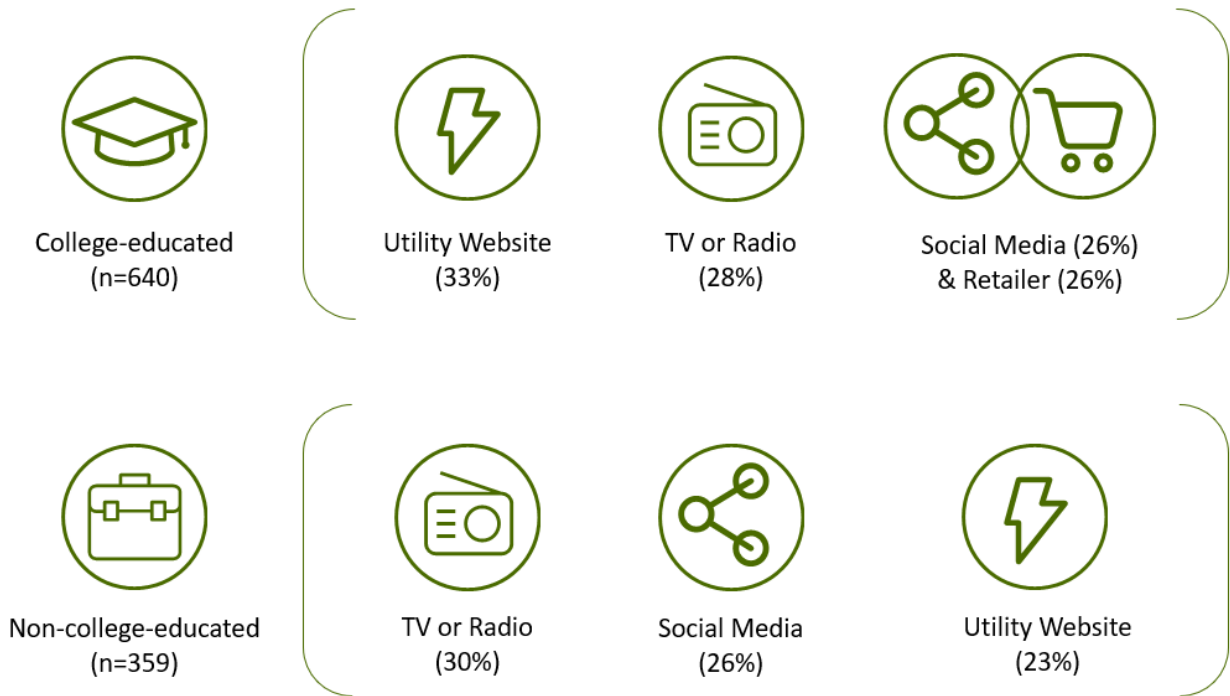


College-educated and non-college-educated respondents also preferred email, postcards, and bill inserts as their top three methods of communication. However, preferences for communication channels then diverge. College-educated respondents are more likely to look to utility websites for more information on NHSaves programs while non-college-educated respondents rely on television and radio (Figure 11).

<sup>42</sup> 2012 Massachusetts Statewide Marketing Campaign Evaluation Report: Respondents were asked to rate their opinion, from very favorable, somewhat favorable, somewhat unfavorable, and very unfavorable, of the Mass Save campaign based on the description of the campaign. The 2010 Massachusetts Statewide Energy Efficiency Baseline Study did not measure favorability of the Mass Save campaign.

<sup>43</sup> Survey question: B8: What is the best way to reach households like yours to let them know about the NHSaves programs?

Figure 11. Diverging Preferences of Communication Channels by Education (Multiple Response, n=999)



For energy saving tips, most residential respondents reported that they would conduct a general online search (71%, n=653) (Table 16).<sup>44</sup>

Table 16. Source for Energy-Saving Tips

Source	n	Percent
NHSaves	11	1%
Utility	178	20%
Internet search	653	71%
Other sources	51	6%
Government	25	3%

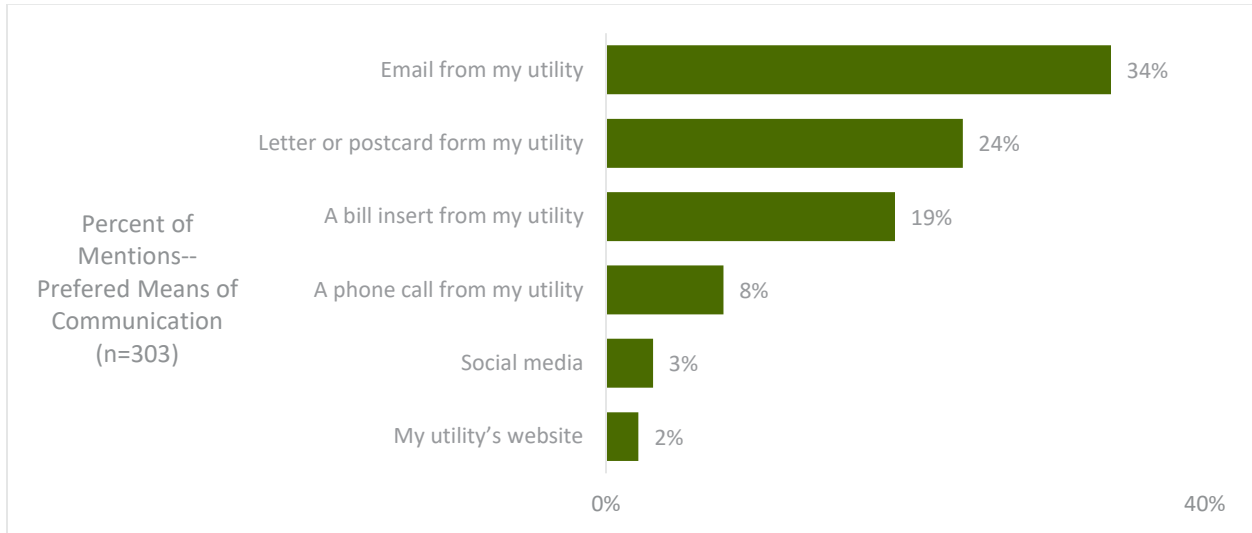
In describing sources of information that they might use to learn about energy efficiency or making upgrades to their homes, some focus group participants mentioned that they might visit their utility’s website or the NHSaves website. However, participants more commonly noted general internet searches and talking to employees at stores like Home Depot, Lowe’s, or JC Penny (for appliances).

**Non-residential Customers.** When asked what channel of communication they thought were the best way for NHSaves to reach more customers like themselves, the most common SMB response was an

<sup>44</sup> Survey question: A4: If you wanted to know more about energy saving tips and strategies, where would you go for information?

email from their utility (34% of responses), followed by a letter or postcard from their utility (24%), a bill insert from their utility (19%), or a phone call from their utility (8%), showing a preference for direct utility communication.<sup>45</sup>

**Figure 12. SMB Preferred Channels for Communication**

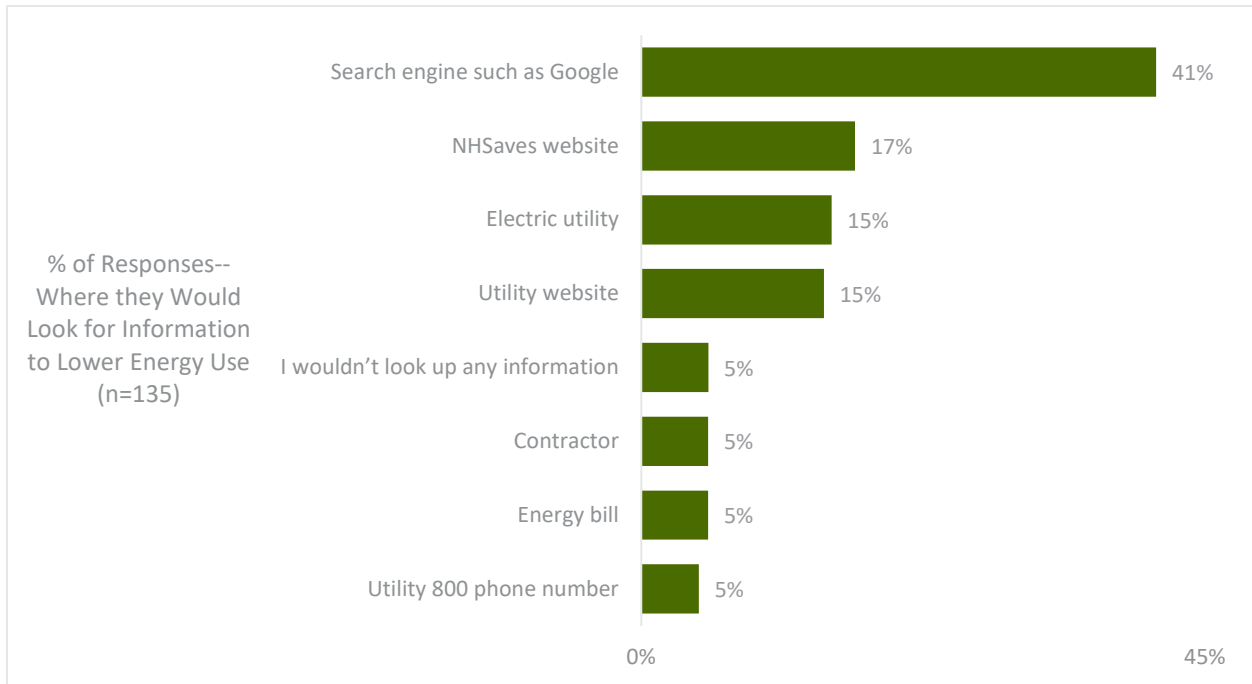


Large non-residential customers suggested using utility key account representatives, holding more seminars or conferences, and conducting more outreach, education, and marketing to reach customers like them. Some said bill inserts or mailers were ineffective because they may not reach the right person, and suggested targeting the person responsible for facility operations, maintenance, and energy use decisions to overcome this obstacle. Large municipal key accounts suggested reaching out to town managers, finance directors, and public works directors to best reach customers like themselves.

We asked SMBs where they would look for information to learn about how to lower their energy use. Respondents were provided a list of options, though suggestions not listed were also recorded. While a general internet search was most commonly cited (41%), the second most commonly cited resource was NHSaves.com (17%). This aligns with the earlier finding that SMB customers see NHSaves as a trusted advisor.

<sup>45</sup> There were a large number of open-ended suggestions that were only mentioned by one or two respondents; this explains why the top categories' percentages are relatively low.

Figure 13. Where SMB's Would Look for Information to Lower Energy Use



**FINDING 3. CUSTOMERS ARE GENERALLY AWARE OF PROGRAMS TO HELP THEM SAVE ENERGY IN THEIR HOMES OR BUSINESSES. HOWEVER, THE REASONS WHY CUSTOMERS ARE NOT PARTICIPATING VARY**

**ACTIONABLE TAKEAWAYS**

**Improving Awareness of Programs is the Key to Increasing Residential Customer Participation**—Residential customers who had not participated in programs were nearly ten times more likely to cite unawareness of programs as the reason for their not participating relative to the next most common reason. As NHSaves continues to improve and expand its mass-marketing efforts, residential participation should increase with awareness.

**Poor Program Experiences are Not a Key Factor in Lack of Repeat SMB Participation**—Only 4% of past SMB program participants who had not participated again cited a poor participation experience as the reason. Most said they felt it was not yet time to make more upgrades, or their facilities were already adequately energy efficient. Clearly explaining the payback period and providing case studies can be useful in helping customers see the value of making proactive, rather than reactive (“replace on burnout”), energy efficiency investment decisions.

**Continue to Streamline the Participation Experience**—SMBs who had never participated in programs cited time and budget constraints as key obstacles. As these firms do not often have dedicated staff members focused on energy efficiency upgrades, or key account representatives to manage the process, applying for rebates can seem overwhelming. Continuing to streamline the participation process will encourage their participation.

**Increase Program Awareness through Other Channels than Lighting**—As lighting standards improve and lighting savings decrease, it will be important to increase program awareness through other channels. As an example, over half of surveyed SMB customers and nearly a third of residential customers were aware of lighting rebates or programs, but less than a quarter of either group were aware of HVAC-related programs and incentives. By focusing marketing and outreach efforts on measures other than lighting, NHSaves can create a more stable pipeline of future program participants as lighting savings diminish.

**PROGRAM AWARENESS**

**Residential Customers.** Over two-thirds (68%, 718 of 1,060) of residential customers have heard of programs to help them save energy in their home. However, about a third of these customers (489 of 718) do not know what their program options are (Table 17).<sup>46</sup> An additional third of customers have not heard about programs to help them save energy (31%, 342 of 1,060).

These program awareness levels are high relative to Mass Save benchmark awareness levels where only 35% (140 of 400) of Mass Save residential customers reported being aware of energy efficiency rebates or incentives.<sup>47</sup> Of these customers, 57% (148 of 260) did not know what their program options were.<sup>48</sup> Over two-thirds (35%, 140 of 400) of Mass Save residential customers had not heard about programs to make their homes more energy efficient.

**Table 17. Residential Customer Awareness of Programs to Help Them Save Energy**

Awareness of Programs	Count	Percent
Have heard of programs and know what they are	229	22%
Have heard of programs but do not know what they are	489	46%
Have never heard of programs	342	32%
Total	1,060	100%

College-educated customers reported higher levels of awareness of such programs compared to their non-college educated counterparts (76% vs. 54%, respectively).<sup>49</sup> This echoes findings from the Mass Save benchmark study where program awareness was higher among college-educated customers.<sup>50</sup>

Across utilities, a higher proportion of Liberty Gas and NHEC customers were aware of programs (77% and 74%, respectively) while fewer Until Gas (63%) and Eversource electric customers (66%) reported being aware of programs to save them energy. Similarly, we found regional differences in program awareness with more customers aware of programs in the Southwest region (72%), than the North and Southeast regions (54% aware for both regions).

Focus group participants displayed a similar level of program awareness, a small number of the residential participants described being aware of efficiency programs offered by their utilities and

<sup>46</sup> Survey question: A2: Have you heard of programs that help you save energy in your home?

<sup>47</sup> Massachusetts Statewide Energy Efficiency Study: Residential Baseline 2010: Survey question: Do you know if your utility company or energy efficiency service provider is offering any rebates or incentives to make your home more energy-efficient?

<sup>48</sup> This was an aided awareness question used in the Massachusetts Statewide Energy Efficiency Study: Residential Baseline 2010.

<sup>49</sup> 76% (n=646) vs. 54% (n=363). Z-test of proportions shows statistically significant differences (p<0.001).

<sup>50</sup> Massachusetts Statewide Energy Efficiency Study: Residential Baseline 2010.

promoted by NHSaves. As described by one focus group participant, *“I don’t recall ever seeing anything (about programs). Maybe I don’t pay attention, but I get my bill, I always cry a little bit, and then that’s it.”* Focus group participants were interested in learning more about energy saving opportunities available to them, as illustrated by the following participant statement, *“I wish I had known about NHSaves...because it would’ve been a better opportunity.”*

When asked what type of programs customers were aware of, customers most commonly reported having heard about energy audits and weatherization programs, followed by lighting rebates and heating rebates (Table 18).<sup>51</sup>

**Table 18. Program Awareness (Multiple Response, n=203)**

Programs	Count	Percent
Energy audits/weatherization	98	48%
Lighting rebates	63	31%
Heating rebates	37	18%
Appliance rebates	26	13%
Solar panel rebates	23	11%
None	14	7%
Appliance recycling	3	2%
Cooling rebates	4	2%
Other rebates	37	18%

Residential customers learned of energy saving programs from retailers and manufacturers, followed by their utility (Table 19).<sup>52</sup> This corresponds to how customers report learning about NHSaves—primarily when shopping for lighting and appliances.

<sup>51</sup> Survey question: A3: What offerings have you heard of that help New Hampshire residents save energy? (Multiple response).

<sup>52</sup> Survey question: D3: How did you learn about this program? (Open end).

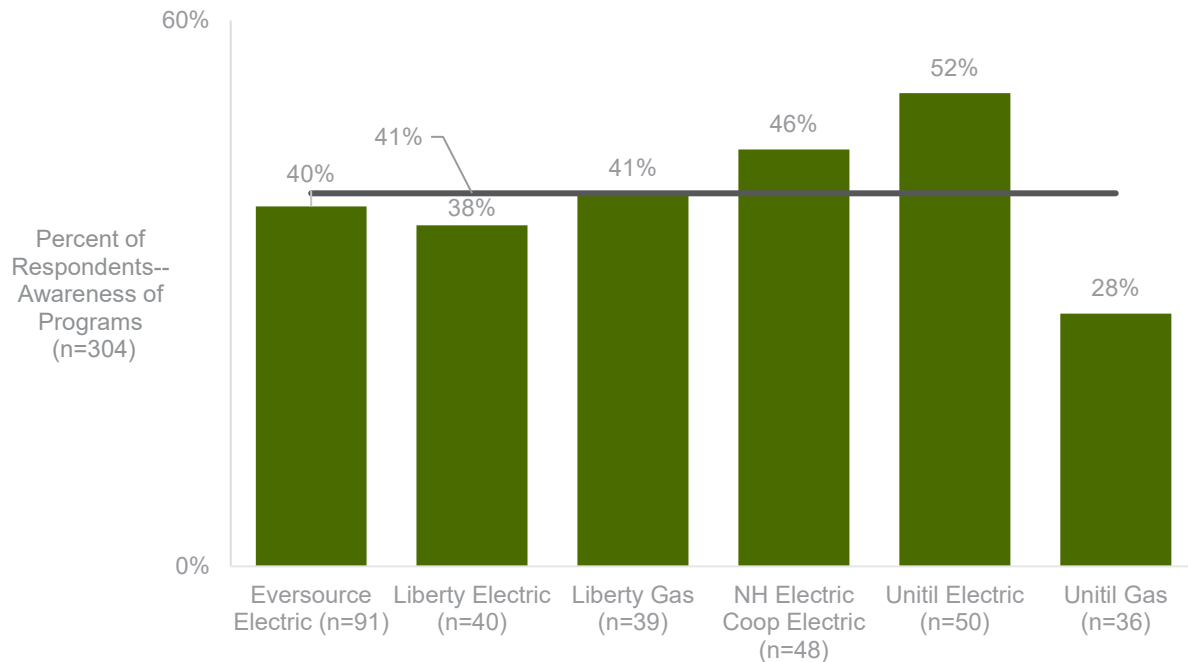


Table 19. How Participants Learned about Program (Multiple Response, n=320)

Source	Count	Percent
Retailer/manufacturer	126	39%
Utility	51	16%
Contractor	28	9%
Word of mouth	21	7%
Print media	11	3%
Online search	8	2%
Email	3	1%
NHSaves	2	0%
Other	32	9%

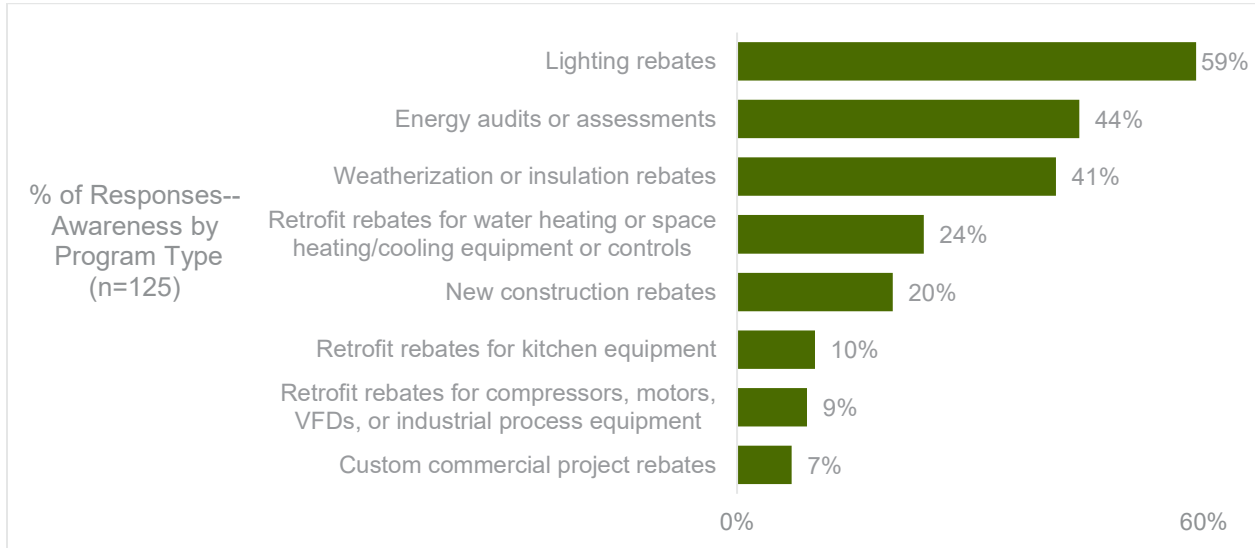
**Non-Residential Customers.** SMB program awareness rates were lower than residential rates, but similar across utility/fuel types, at 41%. Unitil gas customers appear less aware of program availability. This could be more directly related to the mix of gas customers served by Unitil, rather than any inherent difference in Unitil’s promotion of program availability—especially considering Unitil electric customers were the most likely to be aware. Manufacturing facilities, restaurants, and food service facilities showed higher program and incentive awareness, 58% and 52% respectively, while office spaces, business operations offices, and retail outlets showed lower awareness, 30% and 35%, respectively.

Figure 14. SMB Program and Incentive Awareness Prior to Survey



SMB customers are most aware of lighting programs (59%), energy audits and assessments (44%), and weatherization programs (41%, Figure 15). About a tenth (12%) of these program-aware SMB customers reported that they became aware of these programs through NHSaves marketing.<sup>53</sup>

Figure 15. SMB Awareness by Program Type



During in-depth interviews, we asked large non-residential customers what types of services or equipment they felt NHSaves could assist their organization with. While many respondents said they did not know, those more familiar with NHSaves identified a wide range of services and products: energy audits, rebates and rebate information, lighting, motors and drives, pumping systems, building and lighting controls, electric heaters, HVAC equipment, and new construction. We also asked if these large customers were aware of any services provided through NHSaves beyond incentives. Most respondents were unable to name any, though customers who were more familiar with NHSaves expressed excitement about the opportunities the channel provides. Several cited events or information they would not have heard about except through NHSaves, such as energy audits, trainings, seminars, and code workshops.

*“The [seminars] we have gone through have been residential and commercial code workshops and code updates. I think [NHSaves] might be sponsoring some of [them]. I know one of our other staff members attended a Master Energy/Master Planning workshop. I have gotten good feedback from everyone that I have talked to who has participated.”*

**PROGRAM PARTICIPATION**

**Residential Customers.** Among the customers who reported being aware of programs to help them save energy in their homes, 33% have used an energy saving program, service, or rebate in the past (320 of

<sup>53</sup> Survey question PP4: Did you hear about these utility programs, solutions or incentives through NHSaves marketing?; n=96.

1,067). Of those, 24% have done so in the past year (77 of 320).<sup>54</sup> These participation levels exceed that of Massachusetts residential customers in 2012 where only 10% of respondents reported participating in a program in the past year.<sup>55</sup>

Participants most commonly cited participating in lighting and appliance rebate programs (Table 20) aligning with the key ways customers reported learning about the NHSaves brand—when shopping for lighting and appliances.<sup>56</sup>

**Table 20. Program Participation (Multiple Response, n=291)**

Program	Count	Percent
Lighting rebates	127	44%
Appliance rebates	77	26%
Energy audit & weatherization	57	20%
Heating and water heating	32	11%
Cooling rebates	8	3%
Tax break for EE behavior	7	2%
Appliance recycling	3	1%
Other programs	36	12%

Figure 16 highlights the four programs with the greatest awareness and participation rates. Program awareness does not necessarily translate to program participation. This was also the case for the 2012 Mass Save campaign which successfully increased program awareness but did not see a statistically significant increase in program participation.<sup>57</sup> Forty-eight percent of respondents are aware of the energy audit and weatherization program but only 20% have participated in this program (Figure 16). Conversely, only 13% of respondents say they are aware of the appliance rebate program but 44% report participating in this program. Lighting and appliance rebate programs experienced the highest rates of participation.

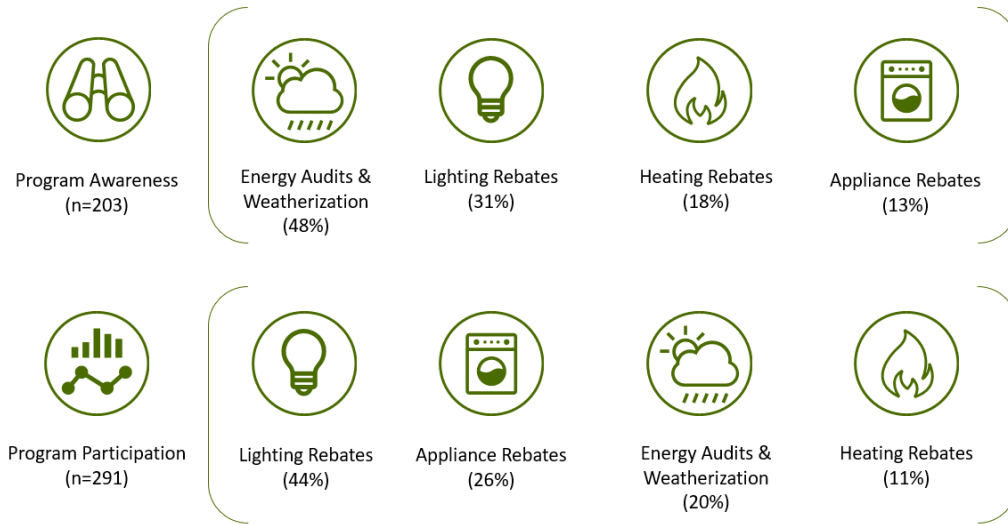
<sup>54</sup> Survey question: D1: In the past, have you used an energy saving program, service, or rebate offered by NHSaves or your electric or gas utility? This might include participating in an energy audit or applying for rebates or discounts for energy saving lighting, appliances, heating, water heating, and cooling equipment.

<sup>55</sup> 2012 Massachusetts Statewide Marketing Campaign Evaluation Report.

<sup>56</sup> Survey question: D2: What program(s), services, or rebates did you use? (Multiple response).

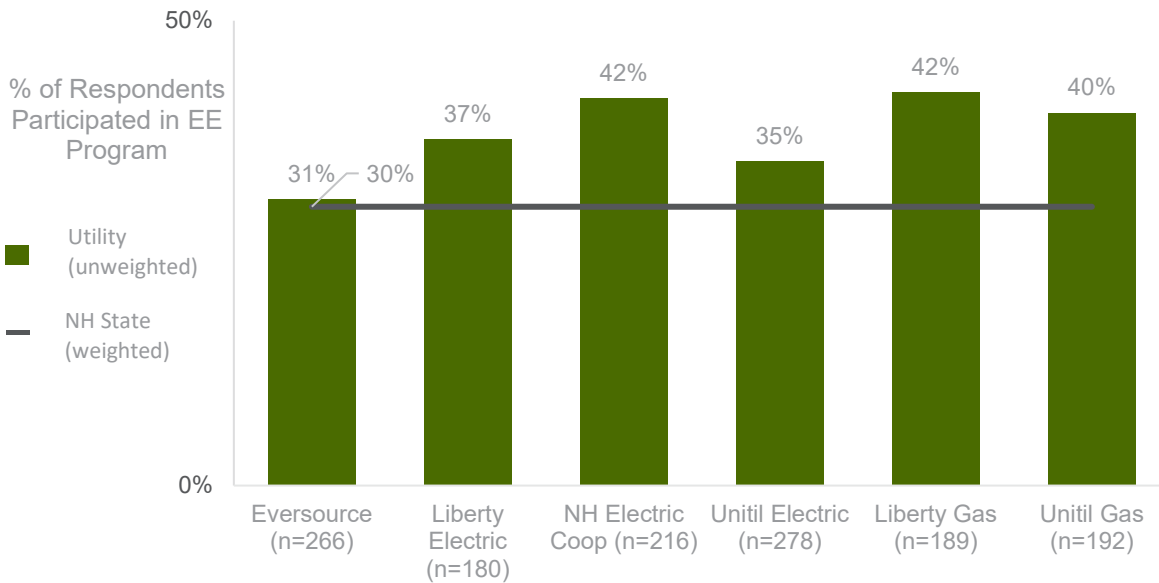
<sup>57</sup> 2012 Massachusetts Statewide Marketing Campaign Evaluation Report. These findings suggest that Mass Save was not yet a key driver of program participation.

Figure 16. Comparing Program Awareness and Program Participation Rates (Multiple Response)<sup>58</sup>



Participation in programs among respondents varies slightly by utility, with the highest levels of customer participation at Liberty Gas and NHEC, and the lowest levels with Eversource.<sup>59</sup>

Figure 17. Respondent Participation in Energy-Saving Programs by Utility



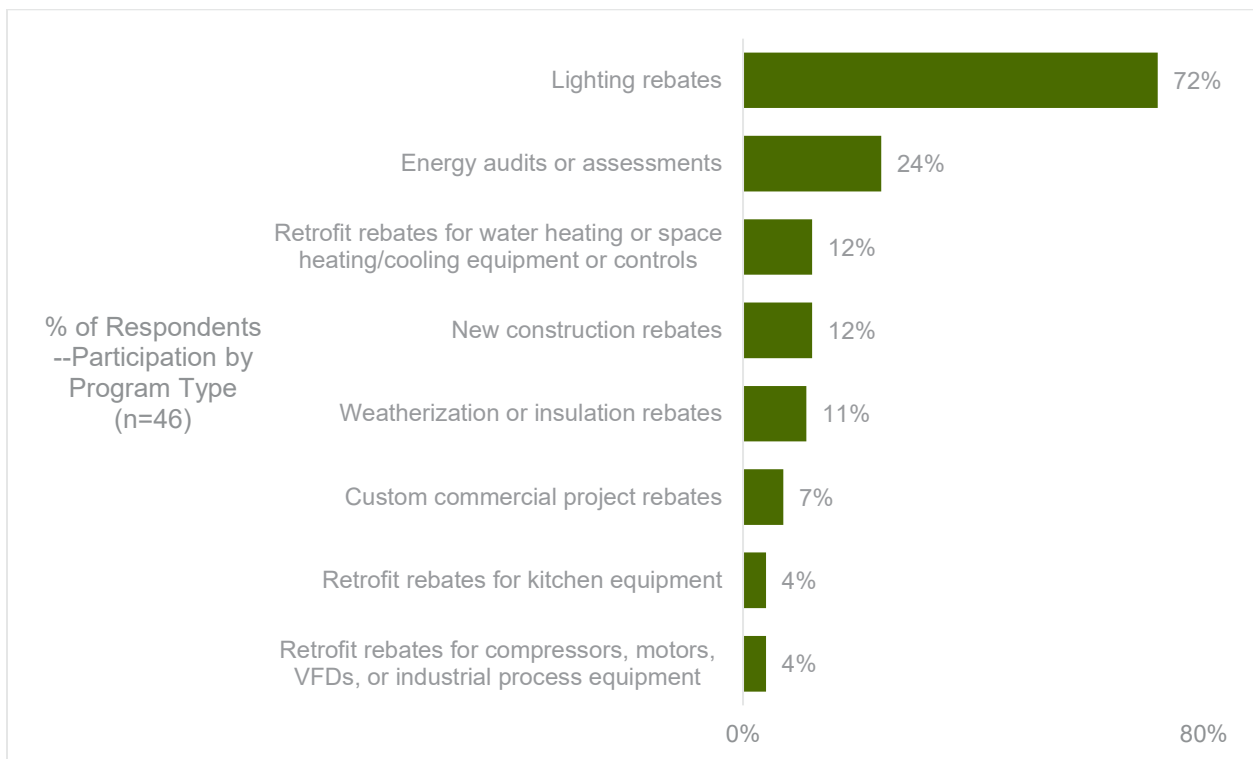
<sup>58</sup> Program awareness and program participation levels were derived from multiple response questions, survey questions D2 and D3 respectively. Survey question D3: How did you learn about this program? (Open end). Survey question D2: What program(s), services, or rebates did you use? (Open end).

<sup>59</sup> Program participation levels were derived from survey question D1: In the past, have you used an energy saving program, service, or rebate offered by NHSaves or your electric or gas utility? This might include participating in an energy audit or applying for rebates or discounts for energy saving lighting, appliances, heating, water heating, and cooling equipment. Response options included: 1) Yes, in the past year, 2) Yes, a year or two ago, or 3) Yes, more than two years ago, 4) No, and 97) Not Sure. Respondents who selected 1, 2, or 3 were considered program participants.

Of the focus group participants who were aware of programs to help them save energy in their homes, most had either participated in one of the programs or recalled receiving information about programs through materials like bill inserts or emails. One focus group participant reported they participated in an NHSaves program to upgrade their refrigerator and pool pump.

**Non-Residential Customers.** Over a third of program-aware respondents had participated in one or more programs, though some could not recall what programs they had participated in or recalled participating in programs not listed. Again, these participation rates exceed Massachusetts non-residential program participation rates of 2012 (25%).<sup>60</sup> Respondents reported the highest rate of participation in lighting programs—72% of SMB respondents who were familiar with programs and incentives in New Hampshire had participated in a lighting program. Energy assessment or audit programs were a distant second, with approximately a quarter of the respondents having participated in these.

Figure 18. SMB Participation by Program Type

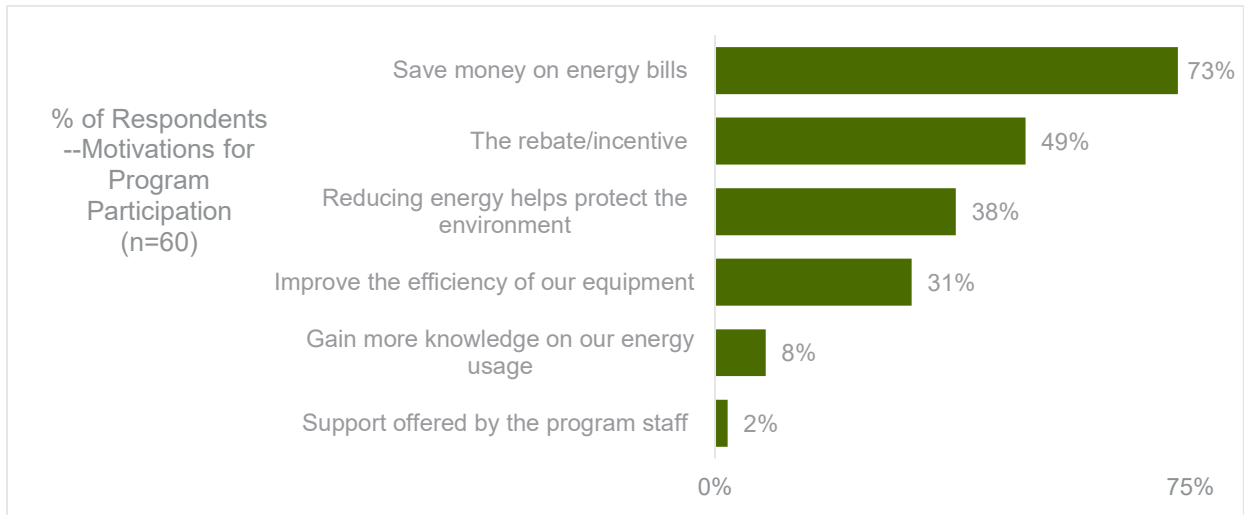


Nearly a third of program-aware SMBs were either currently participating in programs or had participated within the past year. Of these, 50% had participated 2 to 5 years ago, and 11% had participated more than 5 years ago.

We asked program-aware survey respondents to identify their reasons for participating (multiple responses were allowed). The most common reasons cited were related to saving money, protecting the environment was mentioned frequently but less often.

<sup>60</sup> 2012 Massachusetts Statewide Marketing Campaign Evaluation Report.

Figure 19. Motivations for SMB Program Participation



**BARRIERS TO PROGRAM PARTICIPATION**

**Residential Customers.** Most customers cited being unaware of the programs as the main reason for not participating. Customers also mentioned they have not participated because their homes were already energy efficient, they were renters, they did not know how to participate, or that they did not know how to find related information (Table 21).<sup>61</sup>

Table 21. Reasons for Non-Participation (Multiple Response, n=595)

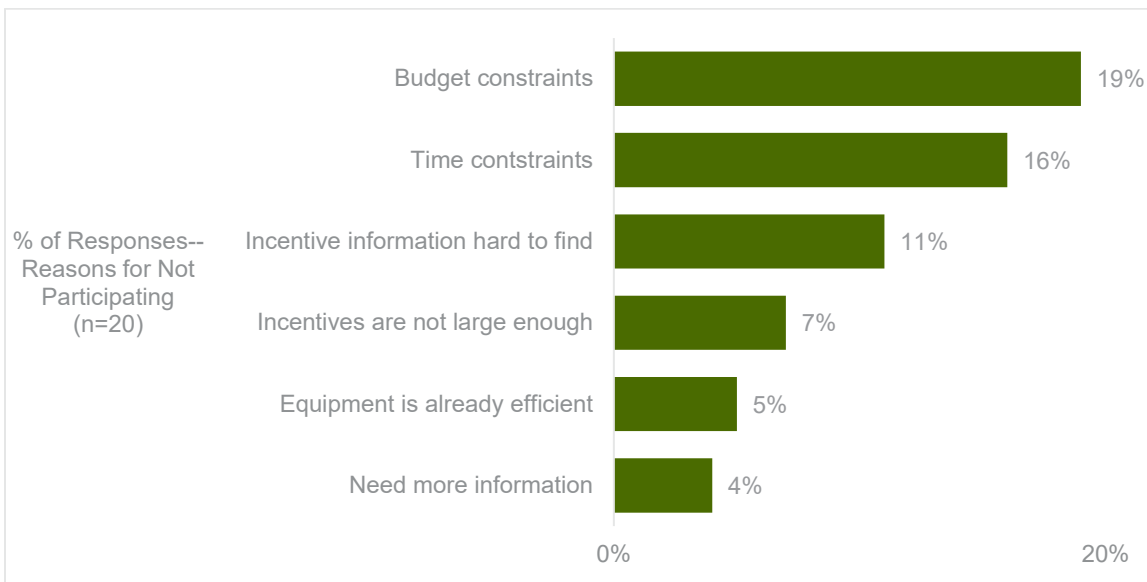
Reason for Not Participating	Count	Percent
I didn't know there were programs	308	52%
House is already energy efficient	38	6%
I'm a renter	38	6%
I didn't know how to participate	34	6%
Didn't know where to get information	26	4%
Recently moved to NH	21	4%
Didn't have the time	15	3%
Didn't want to deal with the hassle	15	3%
Cost of energy-efficient equipment	14	2%
Not sure I qualify	12	2%
Not interested	8	1%
Seasonal resident	6	1%

<sup>61</sup> Survey question: D6: Why haven't you used any of the energy saving programs, services, or rebates? (Multiple response.)

Reason for Not Participating	Count	Percent
Other reasons	104	18%
Total	594	100%

**Non-Residential Customers.** More than half of SMBs surveyed were aware of programs but had not yet participated in any. The top reasons these customers cited for not having participated yet were budget and time constraints. Some customers also suggested incentive information was difficult to find, which may reflect the fact that many SMBs do not have a key account representative or staff member devoted to researching opportunities for energy efficiency investment. In this case, the time involved to research incentives can dissuade them from participating.

**Figure 20. Reasons Program-aware SMB Non-participants have not Participated**

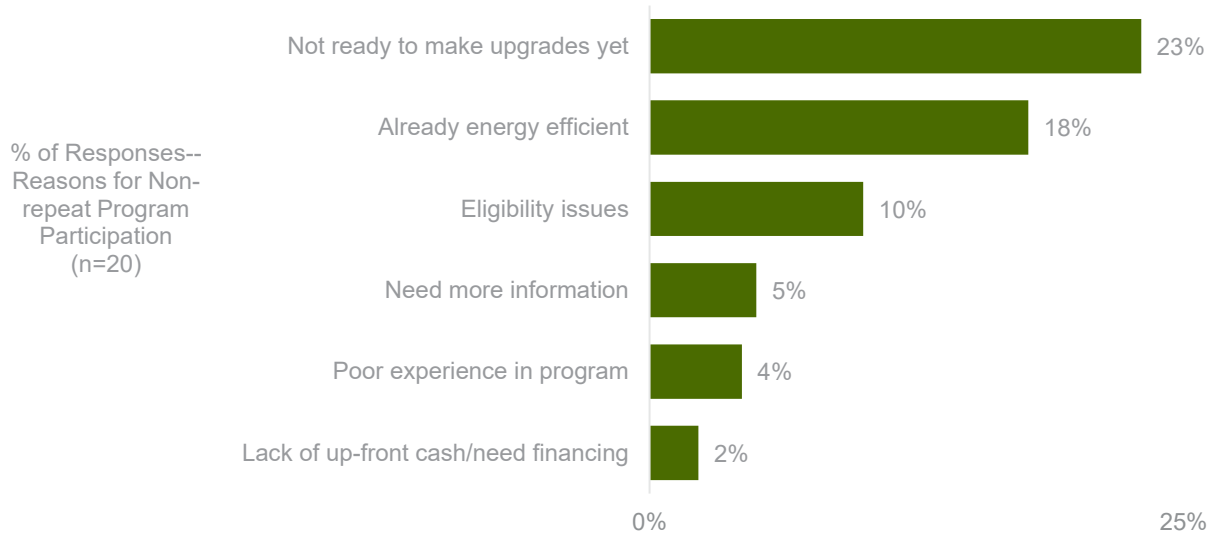


Almost all large non-residential respondents reported using rebates and programs when making energy efficiency upgrades, but to varying degrees. While some customers said they use rebates for every qualifying measure every time they upgrade equipment, others said they only occasionally apply for rebates through NHSaves or utility programs. The handful of respondents that reported never using energy efficiency programs were customers who admitted energy efficiency is not a high priority to their organizations. The most common barrier to participation cited by large non-residential customers was having to prioritize energy efficiency upgrades versus other needs and capital investments given budget constraints. Many suggested it is not worth their time to fill out the paperwork for rebates on small projects, but that—for large projects—they would typically apply for rebates. Others said the scale of projects their utility representatives encourage them to undertake are often too large, and as a result their organization chose not to participate. Additional barriers identified included time constraints, lack of knowledge, poor timing, and resistance to change within the firm.

A key research goal was to understand why some SMB customers participate once, and then never again. To answer this question, we identified customers who had participated two or more years ago, but not more recently, and asked them about their reasons for discontinuing program participation.

Most suggested it was not yet time to make more energy efficiency upgrades (23% of responses), or there was not a need to because their current equipment was already efficient (18%). Only 4% of responses cited poor program experiences as a reason for not participating again.

**Figure 21. Reasons Past Program Participants Failed to Participate Again**



#### FINDING 4. RESIDENTIAL CUSTOMERS FALL INTO FOUR MAIN SEGMENTS WITH TWO SEGMENTS PRESENTING IMMEDIATE OPPORTUNITIES FOR NHSAVES ENGAGEMENT

##### ACTIONABLE TAKEAWAYS

**Leverage Psychographic and Behavioral Segmentation Strategies to Refine Marketing Strategies and Tactics used to Engage those Segments**—Using psychographic segmentation in combination with demographically-based customer segments is likely to provide the most insight into customers lives, world views, and motivations to participate in energy efficiency programs. In short, socio-demographic data tell us *who* a customer is but not what *motivates* a customer to participate in energy efficiency programs. Using psychographic and behavioral segmentation allows us to identify different motivations for participation. These findings can then be leveraged to tailor marketing strategies and tactics to engage those segments and boost program participation.

**The “Engaged Greens” and “Aspiring Greens” Customer Segments Represent Immediate Opportunity for NHSaves Brand and Program Engagement**—These customer segments already have moderate levels of awareness of the NHSaves brand and have participated in energy efficiency programs. In addition, these customers are interested in taking action to save energy and perceive that it is their responsibility to do so. Messaging to these customer segments should leverage these key motivators to further encourage brand engagement and program participation.



**SEGMENTATION FINDINGS**

Using respondents’ energy-related attitudes, beliefs, and behaviors, our research team developed a behavioral segmentation to identify customer segments that might be most open to participating in energy efficiency programs.

**Methodology.** We used both target metrics, such as NHSaves awareness, and a series of attitudinal statements in our segmentation analysis. The first step in our analysis was to identify which statements of the 27 respondents rated resonated most with respondents (Table 22). We used an exploratory factor analysis (EFA) to identify which statements loaded onto a factor and which did not. We discarded statements that did not load onto a factor in our segmentation analysis. EFAs are exploratory and iterative in nature, and we ran several EFA models to identify the correct number of factors—or concepts that resonated with respondents. In our solution, we converged on four factors:<sup>62</sup>

1. Concern about the environment: concern for pollution, climate change, and inefficient use of energy
2. Environmentalism: electricity use linked with environmental outcomes
3. Responsibility and intention to take action: a sense that respondents need to act to help the environment and keep their bills low
4. Energy efficiency and environmental behaviors taken: taking actions associated with environmentalism and energy efficiency

**Table 22. Attitudinal Statements and Factor Loadings**

Statement	Factor
How concerned are you about... Water pollution	Concern Factor
How concerned are you about... Climate change	Concern Factor
How concerned are you about... Dependence of foreign oil	--
How concerned are you about... Air pollution	Concern Factor
How concerned are you about... Inefficient use of energy	Concern Factor
How concerned are you about... Greenhouse gas emissions	--
How much do you agree with... I agree whether there is enough money to pay my energy bill	--
How much do you agree with... I worry that the cost of energy for my home will increase	--
How much do you agree with... Household electricity use has an impact on the environment	Environmental Factor
How much do you agree with... Conserving electricity will help reduce global warming	Environmental Factor

<sup>62</sup> EFAs are particularly useful to see how customers respond to various statements. In other studies, using similar statements, financial and environmental aspects of the statements converged into separate factors. However, in our series of EFAs, financial and environmental statements converged into one factor – the responsibility and intention to take action factor. Further, concern for financial aspects of energy use did not load onto any factor, meaning responses did not correlate with responses for other statements. While some statements alluding to frugality and cost consciousness, such as taking action to keep bills lower, did load on a factor, these statements correlated with environmental statements about taking actions.

Statement	Factor
How much do you agree with... It is my responsibility to use as little energy as possible to help the environment	Responsibility and Intention to Act Factor
How much do you agree with... I feel guilty if I use too much energy	Responsibility and Intention to Act Factor
How much do you agree with... I have to take the lead in my household if we're going to keep our utility bills down	Responsibility and Intention to Act Factor
How much do you agree with... If others in my household can't or won't change their behavior to lower our utility bills, I feel I should do even more to control our energy costs	Responsibility and Intention to Act Factor
How much do you agree with... If my utility bill goes up, I feel like I must do something to reduce it	Responsibility and Intention to Act Factor
How much do you agree with... I usually pay more for products that are environmentally friendly	Target Behavior Factor
How much do you agree with... There isn't much any individual can do to conserve energy that will have any effect in the long-term	--
How much do you agree with... I can't think of anything else to do to help reduce energy use in my home	--
How much do you agree with... I intend to conserve gas or electricity consumption in my home this winter	Responsibility and Intention to Act Factor
How much do you agree with... I know what actions to take to reduce my energy use	--
How frequently did you... Use sleep features on your computer	Target Behavior Factor
How frequently did you... Unplug appliances and equipment when not using them	--
How frequently did you... Visit your utility website for tips	--
How frequently did you... Run laundry with cold water	--
How frequently did you... Turn off lights when not in use	--
How frequently did you... Set thermostat to different temperatures for different times of the day	--
How frequently did you... Use dishwasher only when full	Target Behavior Factor

Next, we conducted a two-step cluster analysis using the four psychographic factors from the EFA as well as key target metrics for NHSaves: program awareness, program participation, and NHSaves awareness. Two-step cluster analyses integrate methods from both K-means cluster analysis and Hierarchical cluster analyses and thus provide a robust clustering method for data that include both ranking data such as our psychographic factors as well as categorical data such as our target metrics.

Our cluster analyses converged on four distinct groups of respondents. Below, we describe the key customer segments (Figure 22 and Figure 23).

Figure 22. Residential Segment Descriptions

**Engaged Greens (24%)**



Engaged greens are familiar with energy efficiency programs. A third are also aware of what NHSaves offers, and over half of engaged greens have participated in programs. Engaged greens have the highest level of concern with environmental issues, they perceive a high level of responsibility to take action, and they frequently engage in energy saving behaviors.

**Aspiring Greens (27%)**



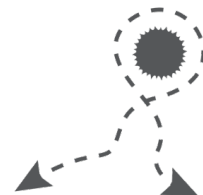
Aspiring greens have moderate levels of awareness of NHSaves, awareness of energy efficiency programs, and have participated in energy efficiency programs. They have high levels of concern with environmental issues, perceive a higher level of responsibility to take action, and frequently engage in energy-saving behaviors.

**Peripherally Aware (25%)**



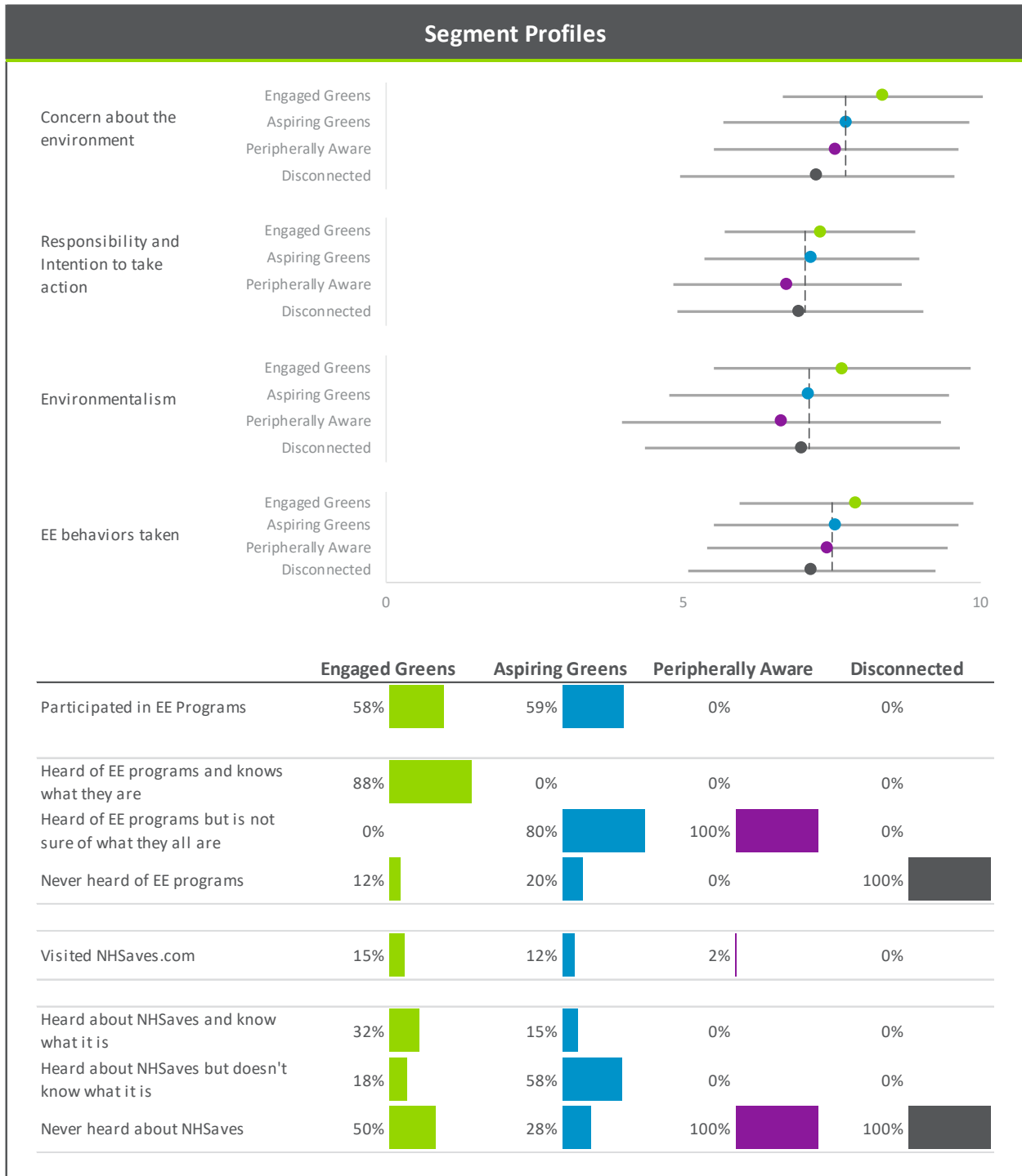
They are generally aware of energy efficiency programs, but do not know about their program options, and have never participated. Peripherally aware are least likely to be concerned about environmental issues and feel less responsibility to act either financially or environmentally than all other segments yet they engage in more energy-saving behaviors than the disconnected.

**Disconnected (24%)**



They have lower levels of awareness of NHSaves, and lower levels of participation. Disconnected customers are least concerned with environmental issues, perceive a lower level of responsibility to take energy efficient actions, and do not frequently engage in energy-saving behaviors.

Figure 23. Residential Segment Profiling Scores



**Engaged Greens (24%).** This customer segment is familiar with energy efficiency programs and has the highest percentage of customers who have visited the NHSaves.com website (15%). They are familiar with NHSaves and its offerings (32%) and a majority (58%) have participated in energy efficiency programs (n= 142 of 284).

Speaking to their “green” nature, Engaged Greens have the highest level of concern about environmental issues such as air pollution, climate change, water pollution, and inefficient use of energy. They also feel a high level of responsibility to take energy-saving actions, and they frequently engage in energy-saving behaviors. They are very concerned with the impact of energy in the environment (see Figure 23).

Engaged Green customers are likely to be college-educated and older, 44% are retired. A third make more than \$100,000 a year, and are more likely to be home owners, with 88% of this customer segment owning their home (see Table 23).

**Aspiring Greens (27%).** Among customers in this segment, 59% have heard of energy efficiency programs. Relative to other customer segments, a moderate number of Aspiring Greens have visited the NHSaves.com website (12%). While many in this segment have heard about NHSaves, most do not know what it offers (of the 72% of Aspiring Greens who were aware of NHSaves, 15% were aware of what it is). Like the Engaged Greens, over half of Aspiring Greens have participated in an energy efficiency program.

Aspiring Greens have a fairly high level of concern with environmental issues such as air pollution, climate change, water pollution, and inefficient use of energy. They also feel a high level of responsibility for their energy bills and they frequently engage in energy-saving behaviors. They are very concerned with the impact of energy in the environment (see Figure 23).

The Aspiring Greens are more likely to be college-educated and middle-aged (within the 45-54 age range). They are likely to own their homes (90%) and live in single-family, detached homes (76%, see Table 23).

**Peripherally Aware (25%).** Peripherally Aware customers are aware of energy efficiency programs but do not know what these programs are and have not participated in them. Few Peripherally Aware customers have visited the NHSaves.com website (2%).

Peripherally Aware customers are less concerned about environmental issues such as air pollution, climate change, water pollution, and inefficient use of energy. They also feel less responsibility to take energy-saving actions (see Figure 23).

While this segment had the youngest respondents (19% are between 18 and 34), most are middle-aged, with 44% between 45 and 64 years old. Peripherally Aware customers are more likely to rent their home and live in apartments than the Engaged and Aspiring Greens. Peripherally Aware customers are equally likely to be college-educated and employed as the Engaged and Aspiring Greens but are less engaged with media than the Greens. They will get news from a website or app and want to learn about NHSaves via postcard or email (see Table 23).

**Disconnected (24%).** All customers in this segment have not heard of energy efficiency programs or NHSaves and have not participated in any energy saving programs.

Disconnected customers have the lowest level of concern about environmental issues such as air pollution, climate change, water pollution, and inefficient use of energy. Like the Peripherally Aware, Disengaged customers feel a lower level of responsibility to take energy saving actions and they do not engage in energy saving behaviors as frequently as other segments.

Disconnected customers are more likely to be lower income, renters, and live in apartments. This group has the highest proportion of working-age customers and the fewest retirees.

Disconnected customers do not frequently use most media, though they will watch the local news and go on the web for news.

Disconnected customers provided the fewest recommendations on how to learn about NHSaves, but 20% of Disconnected customers want to learn about NHSaves from word of mouth. In contrast, 11 to 16% of other segments wanted to learn about NHSaves via word of mouth (see Table 23).

**Table 23. Demographics and Media Preferences by Segment**

Response Option	Engaged Greens	Aspiring Greens	Peripherally Aware	Disconnected
Own Home	88%	90%	79%	76%
Rent Home	12%	10%	21%	24%
Income: \$49 k or less	28%	24%	29%	28%
Income: \$50k to \$99k	37%	30%	30%	42%
Income: \$100k or more	34%	47%	41%	30%
Single-family detached home	78%	76%	60%	55%
Other type of home	22%	24%	40%	45%
Age: 18 to 34	5%	16%	19%	13%
Age: 35 to 44	10%	10%	12%	14%
Age: 45 to 64	40%	47%	44%	46%
Age: 65 and older	46%	28%	25%	28%
College Educated	68%	75%	69%	44%
No College Education	32%	25%	31%	56%
Employed	53%	65%	69%	71%
Retired or unemployed	47%	35%	31%	29%
Read any newspapers in print	30%	26%	12%	14%
Listen to news on the radio	49%	37%	31%	33%
Watch local television news	61%	49%	47%	53%
Get news from a news website or app	50%	39%	43%	38%
Get news from a social networking site	13%	21%	17%	17%
Learn about NHSaves: Bill insert	50%	47%	33%	35%
Learn about NHSaves: Postcard	44%	49%	48%	36%
Learn about NHSaves: Email	60%	52%	50%	43%
Learn about NHSaves: TV or radio ads	32%	29%	29%	25%
Learn about NHSaves: Word of mouth	11%	16%	11%	20%

These psychographic segments can help NHSaves frame messaging around NHSaves program participation. As the responsibility and intention to take action factor shows, respondents, particularly the Engaged and Aspiring Greens take actions both to keep their utility bills down and because it helps

improve the environment. Using both environmental and cost messaging may help NHSaves induce these customers to participate in programs.

To help identify high-value segments—the Engaged and Aspiring Greens—we ran a series of CART analyses using demographic and utility data to see which datapoints can accurately predict segment affiliation. To ease interpretability of the results, we combined both the Engaged and Aspiring Green segments into one “Green” group and combined the Peripherally Aware and Disconnected segments into one “Disconnected/Peripherally Aware” group. In our CART models, we initially included all demographic data from the survey (such as age, income, education, and homeownership), housing characteristics (home type, fuel type, and seasonal residence), media use frequency ratings, geographic data (region of New Hampshire based on county), and self-reported program participation data. CART analyses use data mining techniques to identify which of these data points best predict group affiliation.

A model that predicted group affiliation accurately (80% accuracy) included the following key predictions:

1. Past program participation: Any customer who has participated in energy efficiency programs across all utilities is a high-value target for further program participation.
2. Region and bill review frequency: Among customers who have not participated in utility programs, those that live in the Southeast AND frequently look at their utility bill are slightly more likely to be in the target group.

Because CART models are data driven and exploratory in nature, excluding or including variables will result in a slightly different solution. In a separate, but equally accurate CART model (88% accuracy), customers who recall having seen mention of NHSaves in a bill insert are more likely to be “Green” customers. Further, more “Green” customers who had not participated in utility programs noted they would prefer to see information about NHSaves in postcards, bills, or letters from their utility; the utility website; a bill insert; or an email from their utility. In contrast more “Disconnected/Peripherally Aware” customers would prefer to see information about NHSaves on the NHSaves website or in retail stores.

To reach customers likely to respond positively to energy efficiency program messaging, we recommend using utility-supplied program participation data as a first outreach to customers. Receptive customers are likely to pay attention to utility communications, either in bill inserts, an email, or a separate postcard mailing. Finally, using environmental and cost messages, not necessarily together, may help induce “Green” customers to participate in NHSaves programs.

## FINDING 5. LARGE COMMERCIAL CUSTOMERS DIFFER FROM SMBS

### ACTIONABLE TAKEAWAYS

**Leverage Large Non-residential Customers’ Environmental Motives**—SMBs are much less motivated by environmental concerns, whereas maintaining a green corporate image, satisfying customers and shareholders with environmental priorities, and upholding environmental sustainability commitments often motivate energy efficiency investments.

**Pay Attention to Seasonality**—Many large non-residential customers follow seasonally-driven budgeting and planning cycles. If information and opportunities are not delivered in a timely

manner, or during the appropriate seasons of the year, they will not have any impact on these customers' energy efficiency investment decisions.

**Maximize Website Usability, Regional Connections and Key Account Reps to Reach National Chains**—Most household-name national retail chains make decisions at the regional or national level, so local store managers are not efficient leverage points. An easy-to-use website, close coordination with utility key account representatives/NHSaves representatives and regional utility influence (beyond New Hampshire) can open doors to maximizing participation by large retailers.

**Pay Increasing Attention to Data Centers**—Data centers are growing in importance and visibility in today's economy and are large energy end-users. Even firms in the real-estate, finance, and telecom realms increasingly rely on data centers. Managing energy use by this rapidly growing large non-residential market segment presents a large energy efficiency opportunity.

**Be Attuned to Customer Payback Periods, Planning Cycles, and Return on Investment (ROI) Requirements**—Large non-residential customers vary greatly in terms of acceptable payback periods and ROI requirements to make energy efficiency projects feasible. These differences can be leveraged for efficient targeting of messages and opportunities.

**Educational Opportunities, Trainings, and Seminars are Valued by Large Non-residential Customers**—While SMBs characteristically face significant time constraints to training and seminar participation, large non-residential customers are oftentimes asking for more of these opportunities. They indicated that trainings and seminars help keep them abreast of trends and innovations and increase NHSaves' visibility and value to customers.

## LARGE NON-RESIDENTIAL CUSTOMERS ARE LESS HOMOGENEOUS THAN SMBS

While SMBs range from offices and small retail outlets to automotive repair shops and neighborhood convenience stores, the challenges and needs of these customers are more uniform than their large non-residential counterparts. We conducted in-depth interviews with a wide range of large non-residential customers, including military facilities, towns, hotels, chocolate manufacturers, ski resorts, financial institutions, telecom providers, data centers, hospital and university campuses, industrial manufacturers of aerospace machinery, nationwide retail shopping chains, and industrially-sized breweries. They had more diverse energy usage concerns and needs: the large energy consumption of data centers, specialized equipment needs for ski resorts and high-tech manufacturers, seasonal constraints of hotels, decision-making challenges of nationwide chains, and legal and organizational challenges of municipal and military customers.

Outreach to these customers must be targeted and tailored, accounting for their varied needs and constraints to be effective. A one-size-fits-all approach to these customers is not likely to increase participation and engagement, though targeted and thoughtful outreach to these customers can result in large savings due to their scale of their operations.

## IMPORTANCE OF ENERGY EFFICIENCY AND REASONS FOR PARTICIPATING

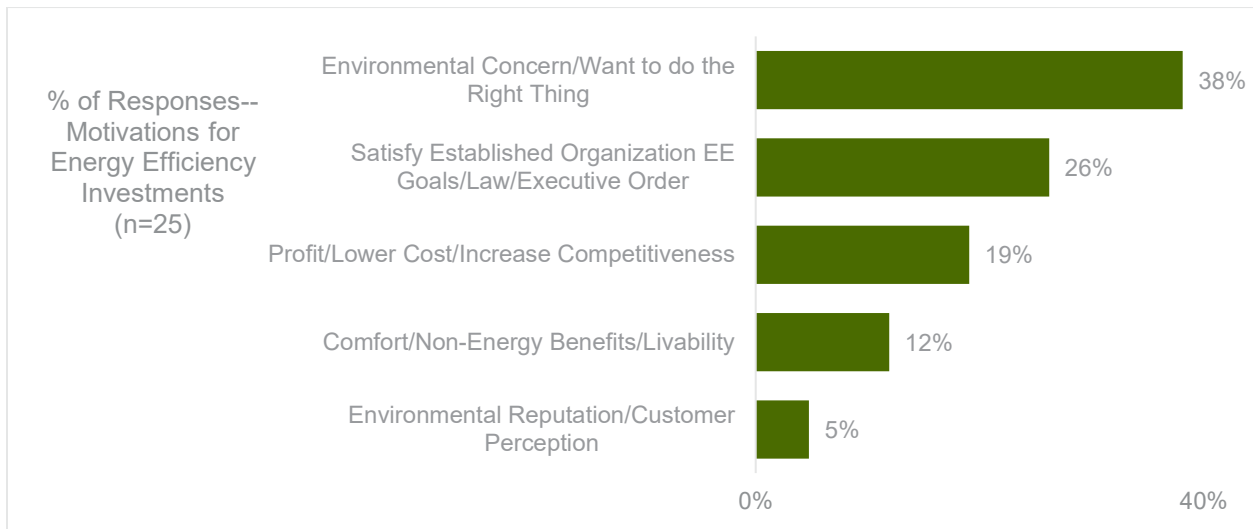
While the majority of SMBs and large non-residential customers felt energy efficiency was important, large customers almost universally said that energy efficiency was a top priority for their organizations.



Nearly 26% of SMBs rated energy efficiency only somewhat important or not important.<sup>63</sup> Only a single large customer said that energy efficiency was not very important to his firm.

SMBs were predominantly concerned with saving money, with environmental concerns cited as a lower priority. By contrast, large non-residential customers were more likely to cite environmental motivations than monetary ones. The majority of SMBs who had participated in programs cited saving money on bills (73% of respondents) and getting rebates or incentives (49%) as motivations for participating.<sup>64</sup> Large non-residential customers most often cited environmental concerns or wanting to do the right thing (38%), increasing profit and competitiveness or lowering costs only accounting for 19% of the reasons they cited.

**Figure 24. Motivations Cited by Large Non-residential Customers for EE Program Participation**



Some unique motivations for large non-residential customers to participate in energy efficiency programs include the need to maintain a pro-environment public image, to appeal to environmentally conscious stakeholders or customers, to comply with the orders of a board of directors, or even—in the case of some large municipal customers—to comply with the law. Medical and higher education campuses, in line with their mission to educate and heal, spoke to their ability to channel energy cost savings through energy efficiency into providing better services to patients and students.

An interesting theme throughout our in-depth interviews with large customers was the increasing presence of data centers, the large amounts of energy they consume, and the motivations for keeping energy costs as low as possible. Large accounts managing data centers expressed that many data centers have been outsourced overseas because energy costs are so much lower abroad. Those businesses that are committed to keeping data centers in the U.S. expressed that energy efficiency will be a critical step in making that feasible, and hence energy efficiency is extremely important to them.

<sup>63</sup> Survey question EE1: On a scale of 0 to 10, where 0 means “not at all important”, and 10 means “very important”, how important is energy efficiency to your business?; Where responses in the range of 0-3 are considered “not important”, 4-6 are considered “somewhat important” and 7-10 are considered “very important.” n=139.

<sup>64</sup> Survey question PP11: What (if any) benefits are there to participating in NHSaves energy efficiency programs?; n=303.

## PROGRAM PARTICIPATION FACILITATORS AND BARRIERS

A key difference between the program experience of large residential customers and SMBs appeared to be the importance of utility key account representatives. SMB customers do not have account representatives, but large customers rely heavily on these representatives to provide them with program information, facilitate program participation, and ensure they maximize the benefits of program participation.

A common thread running through many interviews was that large non-residential customers really trust their utility key account representatives and rely on them to inform them about energy efficiency opportunities such as NHSaves programs and optimize their program participation experience. On any in-depth interview question we asked, a large portion of responses involved key account representatives. NHSaves can leverage these strong relationships to increase program participation and NHSaves awareness by working closely with utility key account representatives.

*“One of the greatest things are the conversations I've had with my key account reps, in that when there are changes to the program, they will let me know that the rebate structures have changed and if there is any money still available out there.”*

*“I have a great working relationship with the key account manager and the account manager from [the firm]. We talk all the time and strategize together.”*

*“For me personally, it is the connection with our utility rep. [He] has great communication skills and personal skills, he works with us very well. I would say if we did not have that good of a relationship we would likely not call upon it. He has done a great job building a relationship with [my firm] and my team.”*

Considering the important facilitation role account representatives play, not having a dedicated utility representative can be a barrier to participation for SMBs. These customers typically face time and budget constraints that make it more difficult for them to find information and participate. When asked about the barriers to their participation they had informative responses.

*“I think some of the barriers are the knowledge of the programs that are out there. If you are a smaller consumer you might not have the same level of contact with your account reps as a larger consumer.”*

*“When there are significant hours of paperwork to submit for only like \$600, it doesn't pay for us to do that. The [utility] personnel say they'll take care of it, but there's also a lot of paperwork I have to supply. It's not really working out that great...I think the [utility] in our area doesn't have enough people to take care of it.”*

*“I think that for the lesser accounts, [what is needed] is being reached out to by the utility on a more personal 101 basis to help them understand what the program is and help them identify areas and payback for potential projects.”*

Large non-residential customers cited a number of unique barriers to program participation not commonly cited by SMBs. Large customers suggested sometimes utility representatives encourage upgrades or advertise rebates at the wrong time in their planning cycle. If the budgeting cycle has just

ended, the window of opportunity has closed, and new suggestions are not considered. Others cited annual changes in program offerings or incentives as barriers to participation, as large custom projects can take over a year to scope and approve. Large customers also have different target payback periods and ROI requirements. For marketing and outreach to be effective, it should be attuned to these differences. To overcome these barriers, NHSaves and utilities must be familiar with customer business and seasonal cycles, payback periods, and ROI requirements and plan outreach accordingly.

Large customers also cited inertia within their firms, especially within management, as a barrier to participation. When things have been done the same way or with the same equipment for a long time, it can be difficult to convince management to accept change. Targeted educational outreach, training, and seminars may be effective at overcoming this barrier.

As a final barrier, one large firm suggested the language in program participation contracts was sometimes challenging, as it limited their ability to claim energy efficiency credits.

### **ORGANIZATIONAL STRUCTURE AND ENERGY EFFICIENCY INVESTMENT DECISIONS**

Organizational structure and the investment decision-making process vary greatly between large customer types and can influence whether and how energy efficiency upgrades are made.

Nationwide retail chains have energy management teams that coordinate decisions from store temperature setpoints to energy efficiency upgrades at a national or regional level. Energy managers at these organizations advocated for energy efficiency strongly because their day-to-day job is focused solely on improving facility performance. These energy managers typically discuss energy efficiency informally on a daily basis and hold formal meetings on energy efficiency weekly, but decisions are made at the national or regional level. For state-level organizations like NHSaves to affect that decision-making process, opportunities must be clearly outlined and communicated, and online information accessibility is critical. Maintaining strong relationships with the utility key account representatives who serve these customers is essential for NHSaves awareness to reach the level of decision-makers within these firms.

Manufacturers in competitive spaces tend to also be highly focused on energy efficiency, but the decision-making process is more decentralized. For some of these firms, innovations may come from technicians on the floor of the facility who log an idea to improve efficiency in the computerized system, which is then made available to review by all staff. If the idea is convincing, it will be discussed during an engineering meeting and capital will be allocated to invest in the improvement. Most of these manufacturing firms hold monthly meetings to discuss ways to reduce operating costs, including energy efficiency improvements, but emphasize that informal daily discussions “in the hall” can be just as effective for generating and promoting energy efficiency ideas. For businesses like these, utility key account representatives working with NHSaves could help ensure these companies are able to take full advantage of programs and services throughout the year.

Municipal agencies, military institutions, and higher education organizations tend to follow regular annual budgeting and planning cycles, so timing is critical to their energy efficiency investment processes. For these types of customers, the decision-making processes for capital investments are usually well defined, regulated, and lengthy. As a result, decisions are usually made well in advance, and may involve voting by citizens or boards of trustees, or approval by governmental agencies such as the Department of Defense. NHSaves might have a strong influence on energy efficiency decision-making

within these organizations by holding informational seminars, conferences, or targeted outreach during their budgeting and planning periods.

For municipal organizations, the payback horizon is typically much longer than in the private sector. As an example, military agencies may consider undertaking energy efficiency upgrades with payback periods of up to 25 years and have them approved by the Department of Defense, whereas many private firms expect a 2 to 3-year payback period on capital investments. These longer payback periods provide NHSaves unique opportunities to market larger-scale energy efficiency upgrades with longer payback periods to these customers.

For businesses such as ski resorts, hotels, and manufacturing firms with processes that shut down seasonally, the energy efficiency decision-making process usually occupies a well-defined period of the year. To effectively communicate opportunities with these businesses and increase participation, it is important for NHSaves to understand and take into account their seasonal planning cycles. Key account representatives from the utilities can help to bridge this gap and ensure information and opportunities are provided during appropriate seasons.

### **UNIQUE SUGGESTIONS FOR IMPROVING NHSAVES**

When asked how NHSaves or the utilities could improve programs or make participation easier, most respondents indicated little room for improvement. Responses about the utilities and their key account representatives were overwhelmingly positive. However, many large customers had constructive suggestions for improvement.

Large customers requested more outreach and educational opportunities, the need for financing, and shorter payback periods on custom projects.

*“Seminars may be more beneficial to make participation easier. There was a seminar where companies could go in and they would show the companies what savings they could have on different projects, what is covered, and vendors were present. But they haven't had it in a while.”*

*“Funding the projects upfront and then increasing the electricity bill going forward so there's no capital outlay, that would help.”*

*“I would like to see the payback calculation come down to where it helps a business doing custom rebates to get that payback lower than what it is now.”*

Because of the increasing presence and relative nascency of data centers as large energy users, several respondents voiced the need for data center-specific incentives and measures such as energy efficient Uninterruptible Power Supplies (UPS). Others suggested the types of lighting controls they were interested in did not currently qualify for rebates.

A ski resort offered an innovative suggestion. The state of Vermont had offered a snow gun buyback program several years ago, which encouraged most ski resorts to upgrade to energy efficient equipment. They suggested New Hampshire ski resorts would be very responsive to this type of program.

## CONCLUSIONS AND FUTURE RESEARCH

This baseline market assessment study suggests New Hampshire customers are highly aware of NHSaves. Insights into the attitudes, behaviors, motivations and participation behaviors of different customer segments provide actionable takeaways that can be leveraged to increase engagement.

### Awareness

#### Double-Messaging of Non-Residential Customers

Higher awareness by non-residential vs. residential customers may indicate they get double-messaging through both residential and commercial marketing. NHSaves can leverage this phenomenon to its advantage.

#### Long History of NHSaves Brand and Logo

New Hampshire customers have high rates of recognition of both the logo and the brand name NHSaves. The brand can build on this historical investment by leap-frogging to marketing focused less on basic awareness and more on in-depth program familiarity.

#### Success with the NHSaves Website

Non-residential customers are engaged with the NHSaves website and have favorable reactions. Non-residential customers utilize the website to learn about rebates and incentives. NHSaves can build on non-residential customer familiarity with the website to increase customer engagement.

*“I thought [the website] was very unique in that it bundled the utility programs into one spot. I thought it was a well-done website. I thought it was all-encompassing.”*

*- Large Non-Residential Customer*

**Messaging**

**Key Account Reps are Critical to Engaging Large Customers**

Non-residential customers prefer direct outreach. Mail and phone outreach are most effective for SMBs, while large non-residential customers rely on key account representatives and in-person contact by utility representatives.

**Email Preferred by Residential Customers**

NHSaves residential customers prefer outreach via email to postcards, bill inserts, and other paper mail contact. NHSaves can use residential customers' preferred means of contact to engage with them at low cost.

**Favorable Customer Perceptions of NHSaves**

The vast majority of customers, both residential and non-residential, have favorable perceptions of NHSaves. NHSaves can build on this strong foundation to deepen customer understanding and trust.

*“For me personally it is the connection with our utility rep. [He] has great communication skills and personal skills, he works with us very well. I would say if we did not have that good of a relationship we would likely not call upon it. He has done a great job building a relationship with [my firm] and my team.”*

*Large Non-Residential Customer*

**Participation**

**Lack of Awareness  
Key Barrier to  
Residential  
Participation**

By far the most common reason residential customers cited for not having participated in programs was lack of awareness. As NHSaves continues mass-marketing efforts program participation should increase.

**Poor Program  
Experiences are  
not why SMB  
Customers Fail to  
Participate Again**

Most non-repeat participation by SMB customers is explained by their tendency to make energy efficiency upgrades out of necessity rather than proactively. NHSaves can consider methods to convince these customers to invest in energy efficiency upgrades earlier to increase repeat participation.

**Streamlining the  
Participation is Key  
to Increasing SMB  
Participation**

As SMBs lack personel devoted to energy efficiency research and do not have key account representatives, time and budget constraints present significant barriers to participation. Streamlining participation is the key to increasing their participation.

**Utilize Channels  
other than Lighting  
to Stabilize Future  
Participation**

As increasingly stringent lighting standards cause lighting savings to shrink, NHSaves must encourage participation through other channels. Far more customers are aware of lighting rebates relative to HVAC and other measure incentives, and if this trend is not altered, program participation may decrease with lighting savings.

**Large non-Residential Customers**

Large Non-residential Customers are Environmentally Motivated

Relative to SMBs, these customers are more likely to be motivated by corporate sustainability goals, green stakeholder and investor preferences, and public image.

Seasonality and Timing of Investment Proposals Matters

Many large non-residential customers face strict seasonal constraints, budgeting cycles, elections, and other cyclical timing constraints that must be accounted for in effective marketing.

Regional Influence, Key Account Reps and Website Usability are Key to Reaching National Chains

National retail chains make their energy efficiency investment decisions on a national or regional level, so outreach at the local level is ineffective. Meaningful outreach leverages regional connections, key account representatives, and an easy-to-use website.

Data Centers are Increasing Rapidly and are some of the Largest Energy Users

NHSaves has the opportunity to harness energy efficiency savings from a new generation of large energy end-users through data centers. These centers are becoming more and more common, and pose special challenges and opportunities for energy efficiency.

Pay Attention to ROI, Payback Periods and Budgetary Cycles

Unlike most SMBs, large non-residential customers face varying ROI and payback period requirements to get approval from investors, boards, and other governing bodies. Paying attention to budgetary cycles is key, as these customers will only consider investments at certain times of the year.

Large Customers look to NHSaves for Trainings, Seminars, and Educational Opportunities

As opposed to SMBs, large non-residential customers have the time and resources to learn about energy efficiency, and appreciate NHSaves educational offerings that keep them abreast of innovations and trends.



This study raised many interesting questions that could fuel future research questions, and while we have posed potential answers to these questions throughout the report, targeted research questions could shed further light on these questions in future market assessment evaluations:

- NHSaves awareness is high given the recency of its mass-marketing efforts. How much of this high awareness is owed to a long history of NHSaves as a brand and logo, and how much is the result of cross-messaging and awareness of similar brands like Mass Saves? What other factors may explain these high levels of awareness?
- If NHSaves shifts messaging toward customers' self-reported preferred communication methods, can this successfully increase customer engagement and program participation, and potentially lower marketing costs by narrowing the approach?
- Many customers were unclear about who funds NHSaves and how it overlaps with or is separate and distinct from the utilities' programs themselves. Does this lack of understanding have any negative affect on engagement and participation, and could educating customers more deeply about NHSaves mission and identity lead to increased engagement?
- Given that lighting savings are diminishing, and lighting programs will likely decrease in importance to energy efficiency portfolios in the near future, what program channels, measures, and outreach efforts can sustain and increase customer engagement with NHSaves, particularly considering most customers currently engage with NHSaves primarily through lighting measures and rebates today?
- As new connected technologies (e.g., the "connected home") become more prevalent, and increasing numbers of customers adopt rooftop solar, electric vehicles (EVs) with home EV charging, smart thermostats, and other advanced technologies, how can NHSaves leverage customer interest and investment in these new technologies to increase their engagement with NHSaves and produce higher savings?

This market assessment research has established baseline attitudinal, behavioral, awareness, customer segmentation, and motivational values describing New Hampshire customers at the outset of NHSaves' mass-marketing campaign changes late in 2018, and primarily represent the historical influence of marketing, programs, and outreach by New Hampshire utilities spanning a decade. These baseline values will provide immediate value to NHSaves by informing marketing and outreach strategies but will provide greater long-term value as benchmark values for comparison against future research to gauge changes and the evolution of customer engagement and attitudes as the brand grows and matures.

Future market assessment research may include additional and new questions but should attempt to maintain continuity with this initial set of questions. NHSaves should keep even the proportions of respondents from different customer segments consistent to allow for "apples-to-apples" comparisons across years and a true understanding of customer changes induced by NHSaves. Moreover, because high awareness of programs, program participation, and other responses are consistent with some degree of selection bias toward more engaged customers in this study, future studies should aim to replicate similar study populations so that, even if the absolute values of some study metrics are higher than reality, the incremental changes between years capture the true population trajectory.

In support of future research efforts, the research team has included all survey and interview instruments, detailed information on customer characteristics and disposition by activity, and sample design and weighting information in this report. Additionally, we are working with the utilities to ensure the data mapping activities we have completed cross-locating customers across different fuel providers and mapping out the overlap of service by NHSaves utilities is sharable with future evaluators to reduce their costs.

**APPENDIX A. ADDITIONAL MATERIAL**

**A.1 Residential Focus-Group Guide**

**A.2 Residential Survey**

**A.3 Non-Residential In-Depth Interview Guide**

**A.4 Non-Residential Survey**

## A.1 RESIDENTIAL FOCUS GROUP GUIDE

### August 9, 2018 | NHSaves Market Assessment Residential Focus Group Guide

TO: New Hampshire EM&V FROM: Navigant and ILLUME Advising

#### OVERVIEW AND RESEARCH QUESTIONS

The research team will perform focus groups with residential customers to augment residential survey findings. The research will explore customers’ perceptions of barriers, drivers, and behavioral levers. It will also dig deeper into customers’ perception of NHSaves, utility programming, and attitudes toward efficiency in general. The research team will use exercises throughout the focus groups, such as tradeoff discussions and self-reflection to generate deeper insights.

Topics will include: attitudes, beliefs and behaviors related to energy efficiency and, more generally, the environment, awareness of and experience with NHSaves brand and website and attitudes toward their utility bills. These focus groups will be video recorded and will last approximately 1.5 hours. We expect these focus groups to take place in September 2018. Timing is contingent on planning, review, approvals, sampling, and recruiting activities.

*NOTE: This focus group guide is not a script for the focus group. Our moderators will use this as a guide to structure the conversation and will be responsive to the particular concerns of the participants. This may mean that the moderators spend longer on certain topics than others and delve into greater depth in specific areas depending on the participants’ concerns and experiences. The purpose of this guide is to highlight the key topic areas we will cover during the focus group.*

To understand the attitudes, experiences, needs, concerns and behaviors of residential customers in relation to energy efficiency. The following research questions will guide our focus groups:

**Table 1: Research Questions**

Research Objectives	Research Questions	Focus group questions
Assess family dynamics of NH Residents	What is the family dynamics like in relation to improvements/changes in the household?	B1.1,2,3,4,5,6, 7,8,9 B2.,1,2,3
	What is the family dynamics in relation to energy-related improvements/changes in the household?	B3.1,2,3,4,5,6, 7,8,9,10,11
Assess overall knowledge and awareness as well as attitudes and beliefs about energy efficiency	What are customers’ behaviors in relation to energy efficiency? How do residential customers use energy in the household? What approaches/strategies do they use to control energy use in their household?	D2.1,2,3,4,5,6, 7,8,9
	What are residential customers’ attitudes and beliefs towards energy conservation in the household? How important is it to conserve energy for residential customers?	C1.1,2,3,4,5,6

	What are residential customers' perceptions/concerns about energy spending in relation to other expenses in the household?	D1.1,2,3,6,7,8,9
	What is their knowledge about energy efficiency in the household? What are their needs when it comes to energy efficiency?	D2.4,5
	What are the main motivators to engage in energy efficiency behaviors?	D2. 8
	What are the main deterrents to engage in energy efficiency behaviors?	D2.9
	What resources do they use when getting informed about energy use/conservation?	D1.6,7
	What are NH residents' beliefs/values relating to the environment?	E1.1,2,3,4,5
NHSaves Awareness/Knowledge/Perceptions	How knowledgeable/aware are customers about NHSaves? What is their overall perception of NHSaves?	F1.1,2,3,4,5,6,7,8,9,10,11
	How knowledgeable/aware are customers about NHSaves programs?	
	What motivates customers to participate in energy efficiency programs?	H1.1,2,3
	What keeps customers from participating in energy efficiency programs?	H1.4
Satisfaction/Experience with NHSaves.com	What is the customer experience with NHSaves.com? What is the level of customer satisfaction? What are the opportunities for improvement? How do they rate the content, ease of navigability, etc.	G1.1,2,3,4,5,6,7

## RECRUITMENT SCREENER SCRIPT

Hello, my name is **[Interviewer Name]** with **[Company Name]**, calling on behalf of <UTILITY>. We're calling with an opportunity to participate in a research study about your several energy-related topics. We're offering \$100 in exchange for approximately an hour and a half of your time to participate in a focus group. This focus group would be conducted online with 6-7 other customers where we would talk to you about your experiences as a customer, your energy use in the house and your utility expenses, among other topics. This a great opportunity to provide important input to <UTILITY> that will inform how they design programs to help their customers save energy. To that end, their research partners at ILLUME Advising are conducting focus groups with customers like you.

**[Gauge interest and continue]** I'm looking to speak with someone actively involved in decision making around energy management in the house – is that you? **[IF NOT – get the most appropriate person, repeat intro and continue]**

**[IF NEEDED, to explain study]**

**[Interviewer Note:** If customer asks about how their information is kept secure, please use the following response, "We do not record the audio of these calls and we maintain safeguards to protect survey



responses. These include, for example, physical security of our facilities, technical safeguards to protect electronic data, and manager supervision.”]

## SECTION A: INTRODUCTION (15 MINUTES)

*My name is \_\_\_\_\_ and I work for ILLUME Advising, a national research firm. We're working with Your Electric/Gas Company to better understand what is important to you as far as energy use and energy efficiency, as well as your experience with your utility. Thank you so much for joining us today. I'm looking forward to speaking with you all and learning more about your house, your energy needs and concerns, and getting your feedback on the experience you've had with your utility.*

*Before we get started, I want to cover a few housekeeping items that you probably heard when you logged in:*

- a. If you called in on a phone, please make sure to keep your computer speakers muted*
- b. Refrain from using speaker phone during the meeting to prevent feedback/echo*
- c. If you experience any issue with the connection to the online meeting room, please log back in by following the same link in your email to the meeting room*
- d. If the call drops, our technician will dial back out to you to join us in the conference again. Alternatively, you can dial back in using the same conference number you first used.*

*The most important thing about this group is to be honest about what you think – we are only speaking to a small group of customers, and we really value your honest feedback. There are no right or wrong answers.*

*Also, we all have our own unique experiences based on our backgrounds. One ground rule is that we respect each other's opinions. We will do a couple group activities, please make sure you have pen and paper handy.*

*We are recording today so my team can refer to what we discussed. No part of the recording will ever be distributed publicly, and neither your name nor any identifying information will be associated with what you say.*

*With that, let's get started! As an ice breaker, I'd love for us to learn a bit more about each of you. I want to start by going around the "room" for introductions.*

- a. Please say your name and if you could please tell me about your home and household.*

*Moderator to probe for: What is the size of your house? Who lives in the home with you? How long have you lived there? How old is your house? What kind of technology do you have in your home?*

- b. Next, if you could say one trick that you use in your house to save energy.*

*Participants to introduce self and talk about themselves, their house, home, technology, and energy use.*

## SECTION B: CHANGES, MAINTENANCE/UPGRADES IN THE HOUSEHOLD (20 MINUTES)

### *B1. House drawing activity*

*Let's now talk about home maintenance projects/repairs or improvements/upgrades you have recently made in your house. When thinking about making changes/improvements, in general, in your household, what kinds of considerations do you keep in mind? What factors do you consider when thinking about deciding whether to make home improvements/upgrades?*

*First, draw your home on a piece of blank paper and identify 2 or 3 things you have upgraded/changed in your home recently. Next, identify top 3 priority areas for improvements (that your house needs or that you would like to have)*

- 1) Can you describe the changes/improvements you have made?
- 2) What were the main motivations to make these improvements?
- 3) What tradeoffs did you have to make, if any?
- 4) What other improvements/changes did you consider?
- 5) Who did you consult with before making these improvements?
- 6) Where did you look for information?
- 7) Can you describe aspirational improvements, as well as critical improvements?
- 8) What's keeping you from making these improvements?
- 9) What additional information would help you decide on these improvements?

### *B2. Thinking about the decision-making process to make the upgrades/changes:*

- 1) How are decisions about upgrades made in your house?
- 2) What is the decision-making process like?
- 3) Who is involved in making the decision?

### *B3. Let's think now about energy-related upgrades/improvements.*

- 1) What types of energy-related upgrades/changes, if any, have you made in your home recently?
- 2) What prompted you to consider making this upgrade/change?
- 3) What factors did you consider when thinking about making these upgrades/improvements?
- 4) What were some of the pros, cons and tradeoffs that you consider/had to make?
- 5) What other options did you consider, if any?
- 6) Who did you talk to?
- 7) Where did you look for related information? *(Possible options: Online sources such as online reviews, social media, Consumer Reports, Retailers, Utility company, Advice of friends and family, Contractors/installers?)*
- 8) Which of the sources that we just discussed do you consider most influential in making your decision? Why is that?
- 9) Which of the sources would you consider least influential in your decision? Why?
- 10) Was or would the process be different than when doing any other home improvements?
- 11) How did you make the final decision?



## SECTION C: ATTITUDES TOWARDS ENERGY EFFICIENCY (10 MINUTES)

C1. Next, I'd like to continue with the topic of energy efficiency.

- 1) First of all, what comes to mind when you think about energy efficiency?
- 2) When you think about energy efficiency, what feelings does it bring to you?
- 3) Would you say your house is energy efficient? What makes it energy efficient?
- 4) What does an energy efficient home look like to you?
- 5) In your opinion, is energy efficiency a worthwhile investment when it comes to homes?

a. What are the main benefits?

*Probe for comfort, saving energy, saving money, avoiding waste, home value, environmental impact*

b. What are the cons?

c. Was this a concern when you bought/rented your home?

d. Did someone mention to you that your house was/was not energy efficient?

- 6) Are your appliances energy efficient? Tell me more about what makes your appliances energy efficient/not energy efficient.

*Probe for: Did you see a specific label or rating, such as an ENERGY STAR certification?*

## SECTION D: ATTITUDES/BEHAVIORS RELATED TO ENERGY USE/CONSERVATION IN THE HOUSEHOLD (20 MINUTES)

*D1. I'd like to talk about your energy expenses now.*

- 1) What do you think/how do you feel about your home energy bill at your current home?
- 2) How does energy rank among all of your household bills/expenses?
- 3) Do you monitor your energy bills? Does that help you control your energy use?
- 4) Do you feel that you know how to save energy? Why or why not?
- 5) How did you learn about it?
- 6) Where did you look for information about saving energy?
- 7) Do you have other questions about saving energy?
  - a. If so, where would you look to find information about them?
  - b. How would you prefer to receive information about saving energy?
- 8) Why are you interested in taking actions to save energy?
  - a. Probe for lowering bills, environmental concerns, efficiency, etc.
- 9) Are there strategies/changes you have considered/heard about but haven't implemented?
  - a. If so, why not? What did you do instead, if anything?

*D2. Thank you for sharing. I'd like to talk about the use of energy in your homes.*

- 1) In your daily routines around the house, do you think about your energy use? Can you elaborate on why or why not?
- 2) Do you try to save energy in your daily activities in the house? What are some of the ways that you conserve energy?
- 3) Does your family and do the people you know also save energy? How so?
- 4) What are the main reasons why you save/do not save energy?
- 5) What are the tradeoffs that you make every day when saving energy?
- 6) Tell me about some of the strategies that you use to save energy
- 7) Are there any barriers/problems that prevent you from saving (more) energy?
- 8) Is there anything that you think can help you save more energy, such as information/resources, etc.
- 9) How would you prefer to receive information about saving energy?

*Thinking about other conservation strategies, are there any other strategies/behaviors that help the environment, such as recycling, water conservation, transportation, etc.*

*Moderator to probe for conservation strategies and their motivations.*

## SECTION E: ATTITUDES TOWARDS ENERGY USE AND THE ENVIRONMENT (10 MINUTES)

### *E1. Environmental Concern Activity*

*I'd like to start by asking you to think about the environment. In a piece paper, please make a list of areas that concern you when thinking about the environment. Write as many as you can think of.*

*Moderator to probe around environmental concerns:*

- 1) What are some areas of concern that you wrote down?
- 2) Is energy consumption one of these areas? Why or why not?
- 3) Should saving energy be a priority? Why?
- 4) What are some ways we can save more energy? Who should be mostly responsible for saving energy? (Each of us individually, the government, utility companies, etc.)
- 5) In your opinion, is it important to reduce our energy consumption?
  - a. What are some of the reasons for it?
  - b. Who should reduce energy consumption?
  - c. What are the main benefits?
  - d. What are the main disadvantages?
  - e. What are the main trade-offs?

## SECTION F: NH SAVES – BRAND PERCEPTIONS (10 MINUTES)

*F1. Next, we are going to switch gears a little bit. I'd like to ask you:*

- 1) Have you seen this logo before? (Show NHSaves logo)
- 2) What is it? What do they do? When would you use NHSaves?
- 3) Who can use the services provided by NHSaves?
- 4) What do you associate NHSaves with?
- 5) Who do you think sponsors NHSaves?
- 6) How would you describe NHSaves to someone who is not familiar with it?
- 7) What types of programs/services, if any, are you aware of that NHSaves provides?
- 8) Have you read of/heard about any initiatives/actions that NHSaves has done in the past year?
  - a. What was it/were they about?
  - b. How/where did you learn about it?
- 9) Have you seen any advertising from the company recently? Where? What do you most remember about it?
- 10) Do you have any recommendations for NHSaves about how to better reach customers like you?
- 11) If you had to choose one channel that you'd prefer NHSaves to communicate with you, which one would that be?

*Moderator to probe for pros and cons of different communication channels, as mentioned by participants.*

## SECTION G: EXPERIENCE WITH NHSAVES WEBSITE (10 MINUTES)

*G1. Thank you for sharing. I am curious to know if what your experience has been with NHSaves website.*

- 1) Have you used the NHSaves website?
- 2) What information were you looking for?
- 3) Was it easy/difficult to find?
- 4) Is there anything that wasn't clear in the website?
- 5) What sections of the website did you find most useful?
- 6) What do you wish you could change about the website?
- 7) Is there any information you would like to add in the website?

## SECTION H: PROGRAM EXPERIENCE (10 MINUTES)

**(NOTE: Only if time allows)**

### H1. Experience/feedback with energy efficiency programs

- 1) Have you participated in any hat energy efficiency programs? Why or why not?
- 2) What were the main motivators to participate in this program/ programs?
- 3) What was their experience like?
- 4) For those that didn't, what were the main barriers to program participation?

*Thank you for participating in this focus group! We appreciate the time you've taken to speak with us. As a thank you for your participation, you will be receiving a \$100 gift card. I have your email addresses on file. We'll send the gift card to that address within the next two weeks, but likely sooner. Thank you again for your time. It has been a pleasure to speak with you!*

## A.2 RESIDENTIAL SURVEY

### August 16, 2018 | NHSaves Marketing Assessment Final Residential Survey

#### Instrument

**TO:** New Hampshire EM&V **FROM:** Navigant and ILLUME Advising

#### OVERVIEW AND RESEARCH QUESTIONS

Beginning September 5 and continuing through September 26, 2018<sup>1</sup>, ILLUME will conduct surveys with utility customers who live in New Hampshire. The overall goals of this survey are to gauge current awareness of energy efficiency (EE), EE program offerings and the NHSaves brand, understand customer energy efficiency behaviors and perceptions, determine barriers to program participation, and identify effective means to communicate to customers about NHSaves.

TABLE 1, below, provides an outline of the study objectives, research questions, and survey questions. In total, the research team will conduct 800 residential surveys.

We will send all residential customers for whom we have contact information a mailed invitation letter with a web address to take the survey. And, when email address is available, we will send an additional email invitation follow-up. Customers receiving these invitations will be directed to the web survey but given the option to call in by phone to complete the survey.

We will work with industry renowned professional survey house Ewald & Wasserman to conduct these surveys. They will call a sample of non-responders directly via telephone to complete an interview and will offer respondents the opportunity to win one of 50 \$20 Visa gift cards for completing the survey. Surveys will be approximately 15 minutes long.

**Table 1: Research Questions**

TOPIC	RESEARCH QUESTION	SURVEY QUESTIONS
Assess overall knowledge and awareness of energy efficiency	How aware are NH customers about energy efficiency and program offerings? What programs are NH customers aware of? What programs are NH customers not aware of?	A1, A2, A3, A4
	How knowledgeable are NH customers about energy efficiency and program offerings?	A3, F1, F2

<sup>1</sup> Survey fielding timeline contingent upon utility data review, sampling, and any additional data requests.

	What are the differences in awareness and knowledge of energy efficiency across key residential sub-populations, including the low-income and moderate-income populations <sup>2</sup> ; renters versus homeowners; retirees; seasonal homeowners?	G1, G2, G3, G4, G5, G6, G8, G9, G10, G11, G12, G13, G14
	What differences are there in the level of energy efficiency awareness and knowledge by geographic region?	G15
Identify general attitudes, perceptions and behaviors concerning energy efficiency	What are customer attitudes, perceptions, and behaviors related to energy efficiency, and more generally, the environment?	E1, E2, E3, F1, F2, F3
	How do customer segments differ in their attitudes, perceptions, and behaviors related to energy efficiency and the environment?	G1, G2, G3, G4, G5, G6, G8, G9, G10, G11, G12, G13, G14
Develop a deeper understanding of the drivers of energy efficiency program participation and the barriers that impede or prevent participation	In what energy efficiency programs do residential customers participate or have participated in? In what energy efficiency programs do residential customers not currently participate in/have not participated in? What energy efficiency programs are customers most likely to participate in in the future?	D1, D2, D6, D7
	What motivates customers to participate in energy efficiency programs?	D4
	What keeps customers from participating in energy efficiency programs?	D5
	How do barriers differ by population segment?	G1, G2, G3, G4, G5, G6, G8, G9, G10, G11, G12, G13, G14
Identify the means for most effectively communicating with customers and different customer segments	How have customers learned about energy efficiency program offerings?	D3
	What channels do customers prefer to learn about energy efficiency program offerings? And do these channels differ by population segment? <sup>3</sup>	B5, B6, B7, B8
	What is residential customer awareness of the NHSaves website?	C1, C2, C3
	What feedback do residential customers have regarding the NHSaves website?	C4, C7
	What is the level of residential customer satisfaction with the NHSaves website?	C3

<sup>2</sup> The evaluation team will work with the NH utilities to comprehensively define key residential sub-populations.

<sup>3</sup> The evaluation team understands from the NH utilities that there has been limited channel outreach in NH to date. The survey will explore customer preferences related to channel outreach and will be informed by further discussions with the NH utilities.



Establish a benchmark customer awareness level of the New Hampshire utilities' statewide energy efficiency program brand, NHSaves®.	What is the level of residential awareness of the NHSaves brand?	B1, B2, B3, B4, B9
	What are the brand awareness differences across key residential sub-populations, including the low-income and moderate-income populations; renters versus homeowners; retirees; and seasonal homeowners?	G1, G2, G3, G4, G5, G6, G8, G9, G10, G11, G12, G13, G14
	What are the brand awareness differences by geographic region?	G15

**Reviewer Note:** Answer responses in parenthesis will **not be read** during the phone survey and will not appear as options on the online survey. If all answer choices are in parenthesis, the question will be an open end for the web survey.

## SAMPLE DESIGN

Our team will aim for a total of 800 residential customer completes, randomly selected from the utilities' customer databases. This target number of completes will exceed the confidence and precision of 90% +/- 10% at the statewide level and will also optimize the research team's ability to meet that level of confidence and precision for specific segments of interest (e.g., homeownership, housing type, household composition, and income).

We will then develop a stratified random sample of residential customers from the 2017 utility customer databases. Our team will merge data from the 2017 utility customer databases and will assign each customer a unique identification number. If possible, low-income and/or gas customers will be over-sampled based upon rate codes provided as part of the customer information in the utility databases. We will use post-stratification weights to ensure the final sample reflects the NH general population.



## SURVEY INVITATIONS AND REMINDERS

### Mail Invitation

<NAME> <DATE>  
<MAILING ADDRESS>  
<MAILING CITY STATE ZIP>

Dear <NAME>,

Your household has been selected to participate in a brief survey on behalf of a statewide research initiative on the topic of energy. Your participation is very important to us and the region. The survey should only take 15 minutes to complete.

Customers who complete the survey by [DATE] will be entered into a drawing to win one of 50 \$20 Visa gift cards. By taking a few minutes, you will be adding greatly to our understanding of residents' opinions on energy.

To complete this 15-minute survey, please enter the webpage address below into your Internet browser and then type in the LoginID to begin the survey. (NOTE: Please make sure to allow for popups.)

Webpage address: < TBD >

LoginID: <#####>

Your input is very important to us and will be kept strictly confidential. We will use your feedback to help improve our programs for customers like you.

If you prefer to complete the survey by phone, you may do so by calling us at 866.637.6393.

**Customers who complete the survey by [DATE] will have a chance to win one of 50 \$20 Visa Gift Cards!**

<UTILITY> has hired Ewald & Wasserman, a professional research firm, to help conduct this study. If you have any questions about how to respond to this survey, please contact Ewald & Wasserman at 866.637.6393 or email at [study@eandwresearch.com](mailto:study@eandwresearch.com). If you have any questions about this study, you can also contact a <UTILITY> staff member, <UTILITY CONTACT NAME>, at <UTILITY CONTACT PHONE NUMBER>.

Thank you for taking the time to complete the survey!

Sincerely,

<UTILITY CONTACT NAME>  
<UTILITY NAME>

Katrin Ewald, PhD  
Project Director, Ewald & Wasserman



## Email Invitation for Online Respondents

### *Initial invitation*

Subject: <UTILITY> is offering a chance to win \$20 for 15 minutes of your time

Dear <NAME>,

Your household has been selected to participate in a brief survey on behalf of a statewide research initiative on the topic of energy. Your participation is very important to us and the region. The survey should only take 15 minutes to complete.

Customers who complete the survey by [DATE] will be entered into a drawing to win one of 50 \$20 Visa gift cards. By taking a few minutes, you will be adding greatly to our understanding of residents' opinions on energy.

To complete this 15-minute survey, please follow the link below and then type in the LoginID to begin the survey. (NOTE: Please make sure to allow for popups.)

Webpage address: < TBD >

LoginID: <#####>

If you prefer to complete the survey by phone, you may do so by calling us at 866.637.6393. Alternatively, you can follow the link [HERE](#) to take the survey.

Your input is very important to us and will be kept strictly confidential. We will use your feedback to help improve our programs for customers like you.

**Customers who complete the survey by [DATE] will have a chance to win one of 50 \$20 Visa Gift Cards!**

<UTILITY> has hired Ewald & Wasserman, a professional research firm, to help conduct this study. If you have any questions about how to respond to this survey, please contact Ewald & Wasserman at 866.637.6393 or email at [study@eandwresearch.com](mailto:study@eandwresearch.com). If you have any questions about this study, you can also contact a <UTILITY> staff member, <UTILITY CONTACT NAME>, at <UTILITY CONTACT PHONE NUMBER>.

Thank you for taking the time to complete the survey!

Sincerely,

<UTILITY CONTACT NAME>  
<UTILITY NAME>

Katrin Ewald, PhD  
Project Director, Ewald & Wasserman



**Reminder Email Invitation**

Subject: "Last Chance to Win \$20 from <UTILITY>"

Dear [FIRST AND LAST NAME],

Thank you for being an important <UTILITY> customer. Recently, we sent you an invitation to take a survey about the topic of energy. We are now in the last days of collecting customer feedback.

Please take about 15 minutes today to complete the survey. As a thank you for your time, you'll be entered into a drawing to **win one of 50 \$20 Visa® gift cards**.

Your input is very important to us and will be kept strictly confidential. We will use your feedback to help improve our programs for customers like you.

[Click HERE to take the survey](#)

Or copy and paste the URL below into your internet browser:

[\[NH SURVEY LINK\]](#)

If you prefer to complete the survey by phone, you may do so by calling us at 866.637.6393.

**Customers who complete the survey by [DATE] will have a chance to win one of 50 \$20 Visa Gift Cards!**

<UTILITY> has hired Ewald & Wasserman, a professional research firm, to help conduct this study. If you have any questions about how to respond to this survey, please contact Ewald & Wasserman at 866.637.6393 or email at [study@eandwresearch.com](mailto:study@eandwresearch.com). If you have any questions about this study, you can also contact a <UTILITY> staff member, <UTILITY CONTACT NAME>, at <UTILITY CONTACT PHONE NUMBER>.

Thank you for taking the time to complete the survey!

Sincerely,

<UTILITY CONTACT aNAME>  
<UTILITY NAME>

Katrin Ewald, PhD  
Project Director, Ewald & Wasserman

# Survey Guide

## PHONE AND WEB INTRODUCTIONS

### Phone Outbound Introduction

Hi, this is [INTERVIEWER NAME] from Ewald and Wasserman and I'm calling to conduct a brief survey on behalf of a statewide research initiative. Upon completion of this survey you will be entered into a drawing to win one of 50 \$20 Visa Gift Cards. Please note that this is not a sales call.

[IF NAME IS AVAILABLE] May I please speak with <NAME>?

[IF NAME IS NOT AVAILABLE OR IF NEEDED] May I please speak with someone who is involved in making decisions about your home? (IF NEEDED: IMPROVEMENTS SUCH AS REPLACING HEATING EQUIPMENT OR PURCHASING APPLIANCES.)

(IF NEEDED: WE'RE CONDUCTING A SURVEY TO GATHER INFORMATION ABOUT UTILITY ANNOUNCEMENTS YOU AND OTHER RESIDENTS IN THE STATE ARE EXPOSED TO. MY QUESTIONS SHOULD TAKE ABOUT 15 MINUTES TO COMPLETE AND YOUR RESPONSES WILL BE KEPT ANONYMOUS.)

### Phone Inbound Introduction

Can you please verify your PIN number is <SURVEYPIN>? (IF INCORRECT PIN, DISPO AS 95 AND INPUT CORRECT PIN/RECORD)

Thank you very much for calling to participate in this important study. My name is [INTERVIEWER NAME]. The questions should take about 15 minutes of your time.

### WEB Introduction

Thank you for your interest in this survey. Your participation is very important to us and the state of New Hampshire. Upon completion of this survey, you will be entered into a drawing to win one of 50 \$20 Visa gift cards.

We're conducting this survey to gather information about advertisements you and other residents in the state are exposed to. The survey should take about 15 minutes to complete and your responses will be kept anonymous.

## SURVEY GUIDE

### Screener

#### [ASK ALL]

S1. Do you or anyone in your household work for an advertising agency or a market research firm?

- 1. Yes [THANK AND TERMINATE]
- 2. No
- 98. [Not sure] [THANK AND TERMINATE]
- 99. [Refused] [THANK AND TERMINATE]

#### [ASK ALL]

S2. Do you or anyone in your household work for a natural gas or electric company?

- 1. Yes [THANK AND TERMINATE]
- 2. No
- 98. [Not Sure] [THANK AND TERMINATE]
- 99. [Refused] [THANK AND TERMINATE]



## A. NHSAVES/EE Program Awareness

### [ASK ALL]

A1. What organizations are you aware of that promote energy efficiency, (i.e., help you save energy)? [MULTIPLE RESPONSE, OPEN END]

1. (NHSaves)
2. (Gas utility)
3. (Electric utility)
4. (Utility – non-specific)
5. (Manufacturers – ex. Cree, General Electric)
6. (ENERGY STAR®)
7. (Renewable energy organizations/representatives/companies)
8. (Non-profit/non-governmental organization dedicated to environmental Issues)
9. (Non-profit/non-governmental organization not specifically dedicated to environmental issues (i.e. churches)
10. (Local government)
11. (State government)
12. (Federal government)
96. [NONE]
97. [Other, specify]
98. [Not Sure]
99. [Refused]

### [ASK ALL]

A2. Have you heard of programs that help you save energy in your home? [SELECT ONE]

1. I have heard about them and know what they are
2. I have heard about them but do not know what they are [SKIP TO A4]
3. I have never heard about them [SKIP TO A4]
97. [Other, specify] [SKIP TO A4]
98. [Not Sure] [SKIP TO A4]
- 99.[Refused] [FOR WEB: PREFER NOT TO ANSWER] [SKIP TO A4]

### [ASK IF A2=1]

A3. What offerings have you heard of that help New Hampshire residents save energy? [MULTIPLE RESPONSE, OPEN END]

1. (Energy Audits & Weatherization)
2. (Appliance Rebates)
3. (Appliance Recycling)
4. (Heating & Water Heating Rebates)
5. (Cooling Rebates)
6. (Lighting Rebates)
7. (New Construction)
97. [Other, specify]
98. [Not Sure]

99.99. [Refused]

**[ASK ALL]**

A4. If you wanted to know more about energy saving tips and strategies, where would you go for information? **[MULTIPLE RESPONSE, OPEN END]**

1. (NHSaves website)
2. (Utility website)
3. (Call utility 1-800 number)
4. (Internet Search/Online (i.e., Google, Yahoo))
5. (Utility Bill, NOT website or phone number)
6. (Social Media (i.e., Facebook, Twitter, etc.))
7. (Friends, family, coworkers)
8. (State/local/federal government agency or their website)
9. (Retailer)
97. [Other, specify]
98. [Not Sure]
99. [Refused]

## B. NHSAVES Awareness

[ASK IF WEB ONLY]

B1. Before taking this survey, had you seen this logo? [SELECT ONE]



1. Yes
2. No

98. [Not Sure]

99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

[ASK ALL]

B2. Have you seen or heard the term, “NHSaves” before today? [SELECT ONE]

1. I have heard about NHSaves and know what it is
2. I have heard about NHSaves but do not know what it is
3. I have never heard about NHSaves [SKIP TO B8]

98. [Not Sure]

99. [Refused] [FOR WEB: PREFER NOT TO ANSWER] [SKIP TO B8]

[ASK IF B2=1,2,98]

B3. On a scale from 0 to 10, where 0 means “Not at all familiar”, and 10 means “Very familiar”, how familiar are you with the services NHSaves provides? [RECORD 0-10, DK, REF]

[ASK IF B2=1,2,98]

B4. What do you associate with NHSaves? [MULTIPLE RESPONSE, OPEN END]

1. (Energy audit)
  2. (Resource for energy information)
  3. (Utility companies)
  4. (Saving money on my energy bill)
  5. (Rebates/Discounts on high-efficiency equipment and products)
  6. (We all win)
97. [Other, specify]  
98. [Not Sure]  
99. [Refused]

[ASK IF B2=1,2,98]

B5. We’re interested in all of the places where you may have heard about NHSaves, if any. Have you ever seen information about NHSaves ... [RECORD YES, NO, DK, REF FOR EACH, ROTATE]

1. On television? [Yes/No/DK/REF]
2. On social media (e.g. Twitter or Facebook)? [Yes/No/DK/REF]
3. When shopping for appliances? [Yes/No/DK/REF]
4. On a bill insert? [Yes/No/DK/REF]

- 5. When shopping for lighting? [Yes/No/DK/REF]
- 6. On a website advertising banner? [Yes/No/DK/REF]
- 7. At a community event or tradeshow? [Yes/No/DK/REF]
- 8. From a contractor? [Yes/No/DK/REF]
- 97. [Other, specify]

**[ASK IF ANY B5\_1-B5\_97 = YES, IF ALL B5\_1-B5\_97 = NO/DK/REF, SKIP TO B8**

B6. Do you think the messages you saw or heard were clear? [SELECT ONE]

- 1. Yes
- 2. No
- 98. [Not Sure]
- 99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

**[ASK IF ANY B5\_1-B5\_97 = YES, IF ALL B5\_1-B5\_97 = NO/DK/REF, SKIP TO B8**

B7. Where else have you seen or heard about NHSaves? [MULTIPLE RESPONSE, ROTATE]

- 1. Natural Gas Bill
- 2. Electricity Bill
- 3. In the mail
- 4. Word of mouth, friends, family, or coworker
- 5. Gas utility website
- 6. Electric utility website
- 7. Contractor
- 8. Retailer
- 96. Nowhere else
- 97. [Other][Specify]
- 98. [Not Sure]
- 99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

**[ASK ALL]**

B8. What is the best way to reach households like yours to let them know about the NHSaves programs? [MULTIPLE RESPONSE, ROTATE]

- 1. My utility's website
- 2. NHSaves website
- 3. My utility's bill insert
- 4. A letter or postcard from my utility, separate from monthly bill
- 5. Email from my utility
- 6. My contractor
- 7. Retail stores (Home Depot, Best Buy)
- 8. TV/Radio ads
- 9. Social media (Facebook, twitter, Instagram)
- 10. Print media (Newspaper/magazine)
- 11. Family or friends
- 12. Internet ad
- 97. [Other, specify]
- 98. [Not Sure]
- 99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

B9. Please name any organizations that you think sponsor NHSaves. A best guess is fine.

[ALLOW MULTIPLE ANSWERS]

1. Utility company
2. State government
3. Federal government
4. Non-profit organization
97. Other, specify: [OPEN ENDED]
98. Not Sure
99. Refused

## C. NHSAVES Website

[ASK ALL]

C1. Have you ever visited the website NHSaves.com? [SELECT ONE]

1. Yes
2. No [SKIP TO C3]
98. [Not Sure] [SKIP TO C3]
99. [Refused] [FOR WEB: PREFER NOT TO ANSWER] [SKIP TO C3]

[ASK IF C1=1 (YES)]

C2. On a scale of 0 to 10, where 0 means “Not at all agree” and 10 means “Completely agree”, please rate your level of agreement with the following statements: [RECORD 0-10, DK, REF FOR EACH]

1. The information from the NHSaves website was useful. [0-10, DK, REF]
2. I would recommend the NHSaves website to a friend or family member. [0-10, DK, REF]

[ASK ALL]

[C3 INTRO] I appreciate your feedback. NHSaves is in fact a statewide energy efficiency partnership between New Hampshire utilities to provide programs for ALL New Hampshire homes and businesses to save energy. These programs include energy audits and rebates for installing energy efficient lighting, appliances, heating and cooling systems, home insulation, air sealing and improving the energy performance of your home.

C3. Were you aware of this before this call? [SELECT ONE]

1. Yes
2. No
98. [Not sure]
99. [Refused]

[ASK ALL]

C4. And based on this general description, do you have a very favorable, somewhat favorable, somewhat unfavorable opinion, or a very unfavorable opinion of NHSaves? [SELECT ONE]

1. Very favorable
2. Somewhat favorable
3. Somewhat unfavorable
4. Very unfavorable
98. Not sure
99. Refused

## D. Program Participation

### [ASK ALL]

D1. In the past, have you used an energy saving program, service, or rebate offered by NHSaves or your electric or gas utility? This might include participating in an energy audit or applying for rebates or discounts for energy saving lighting, appliances, heating, water heating, and cooling equipment. [SELECT ONE]

1. Yes, in the past year
2. Yes, a year or two ago
3. Yes, more than two years ago
4. No [SKIP TO D6]
97. [Not Sure] [SKIP TO D7]
98. [Refused] [FOR WEB: PREFER NOT TO ANSWER] [SKIP TO D7]

### [ASK IF D1=1,2,3 (PARTICIPATED AT SOME POINT)]

D2. What program(s), services, or rebates did you use? [OPEN END, MULTIPLE RESPONSE, NOTE ORDER]

1. (Energy Audits & Weatherization)
2. (Appliance Rebates)
3. (Appliance Recycling)
4. (Heating & Water Heating Rebates)
5. (Cooling Rebates)
6. (Lighting Rebates)
97. [Other, specify]
98. [Not Sure]
99. [Refused]

### [CATI ASK FOR EACH D2 - WEB ASK ONCE]

D3. How did you learn about this <<PROGRAM FROM D2>> program? (FOR CATI IF D2=DK/REF show: "How did you learn about the program?") [OPEN END] DK/REF

### [ASK IF D1 = 1,2,3 (PARTICIPATED AT SOME POINT)]

D4. What were the main reasons you participated in [IF D2 SELECTION >1 USE "THESE PROGRAMS", ELSE USE "THIS PROGRAM"]? [SELECT TOP 3 RESPONSES, ROTATE]

1. Saving money
2. Saving energy
3. Improve the air quality in my home
4. Making my home more comfortable
5. Protecting the environment
6. For the benefit of future generations
7. Reducing our dependence of foreign oil
8. Helping New Hampshire lead the way on saving energy
9. Desire to improve comfort level in my home
10. Reducing air pollution
11. Increasing the value of my home

- 97. [Other, specify]
- 98. [Not Sure]
- 99. [Refused]

**[ASK IF D1 = 1,2,3 (PARTICIPATED AT SOME POINT)]**

D5. Did you use financing to help pay for any of your upgrades? **[SELECT ONE]**

- 1. Yes, I used utility-provided financing
- 2. Yes, I used bank-provided financing
- 3. No
- 97. [Other, specify]
- 98. [Not Sure]
- 99. [Refused]

**[ASK IF D1=4 (HAS NOT PARTICIPATED)]**

D6. Why haven't you used any of the energy saving programs, services, or rebates?  
**[OPEN END, MULTIPLE RESPONSE]**

- 1. (Cost of energy-efficient equipment)
- 2. (House is already energy efficient)
- 3. (House is too old)
- 4. (Didn't have the time)
- 5. (Didn't want to deal with the hassle)
- 6. (I don't need the money)
- 7. (I didn't know how to participate)
- 8. (Didn't know where to get information)
- 9. (I didn't know there were programs)
- 10. (Didn't have financing options)
- 97. [Other, specify]
- 98. [Not Sure]
- 99. [Refused]

**[ASK ALL]**

D7. How likely are you to participate in an energy efficiency program in the next year?  
Please rate it on a scale, where 0 is not at all likely and 10 is very likely. **[RECORD 0-10, DK, REF]**

**[ASK IF D7= 1 TO 10 (THOSE LIKELY TO PARTICIPATE)]**

D8. Which programs are you most likely to participate in? **[MULTIPLE RESPONSE, ROTATE]**

- 1. Energy audits & Weatherization (Insulation and air sealing)
- 2. Appliance Rebates
- 3. Appliance Recycling
- 4. Heating & Water Heating Rebates
- 5. Cooling Rebates
- 6. Lighting Rebates



- 97. [Other, specify]
- 98. [Not Sure]
- 99. Refused] [FOR WEB: PREFER NOT TO ANSWER]

## E. Attitudes Towards the Environment

### [ASK ALL]

E1. Thinking about energy conservation and the environment, how much effort do you think the following groups should put into addressing this issue? Use a scale from 0 to 10 where 0 means “No effort” and 10 means “A lot of effort”. [RECORD 0-10, DK, REF FOR EACH]

- 1. Each of us individually [0-10, DK, REF]
- 2. The government [0-10, DK, REF]
- 3. Utility companies [0-10, DK, REF]

### [ASK ALL]

E2. On a 0 to 10 scale where 0 means “Not at all worried” and 10 means “Very worried”, how worried are you about the effect of climate change on the following? [RECORD 0-10, DK, REF FOR EACH]

- 1. On the Earth [0-10, DK, REF]
- 2. On the United States [0-10, DK, REF]
- 3. On New Hampshire [0-10, DK, REF]

### [ASK ALL]

E3. On a 0 to 10 scale, where 0 means “Not at all concerned” and 10 means “Very concerned” how concerned are you about: [RECORD 0-10, DK, REF FOR EACH]

- 1. Water pollution [0-10, DK, REF]
- 2. Climate change [0-10, DK, REF]
- 3. Dependence on foreign oil [0-10, DK, REF]
- 4. Air pollution [0-10, DK, REF]
- 5. Inefficient use of energy [0-10, DK, REF]
- 6. Greenhouse gas emissions [0-10, DK, REF]

## F. Energy Efficiency Knowledge/Attitudes

### [ASK ALL]

F1. Now, I’m going to read a few statements. Using a scale of 0 to 10 where 0 means “Not at all agree”, 10 means “Completely agree”, please tell me how much you agree with the following:

[RECORD 0-10, DK, REF FOR EACH, RANDOMIZE]

1. I worry whether there is enough money to pay my energy bill. [0-10, DK, REF]
2. I worry that the cost of energy for my home will increase. [0-10, DK, REF]
3. Household electricity use has an impact on the environment. [0-10, DK, REF]
4. Conserving electricity will help reduce global warming. [0-10, DK, REF]
5. It is my responsibility to use as little energy as possible to help the environment. [0-10, DK, REF]
6. I feel guilty if I use too much energy. [0-10, DK, REF]
7. I have to take the lead in my household if we're going to keep our utility bills down. [0-10, DK, REF]
8. If others in my household can't or won't change their behavior to lower our utility bills, I feel I should do even more to control our energy costs. [0-10, DK, REF]
9. If my utility bill goes up, I feel like I must do something to reduce it. [0-10, DK, REF]
10. I usually pay more for products that are environmentally friendly. [0-10, DK, REF]
11. There isn't much any individual can do to conserve energy that will have any effect in the long-term. [0-10, DK, REF]
12. I can't think of anything else to do to help reduce energy use in my home. [0-10, DK, REF]
13. I intend to conserve gas or electricity consumption in my home this winter. [0-10, DK, REF]
14. I know what actions to take to reduce my energy use. [0-10, DK, REF]

## [ASK ALL]

F2. On a scale from 0 to 10 where 0 means "Never" and 10 means "Always", how frequently do you do the following things, if at all? [RECORD 0-10, DK, REF FOR EACH, ROTATE]

1. Use sleep features on my computer [0-10, DK, REF]
2. Unplug appliances and equipment when not using them [0-10, DK, REF]
3. Visit my utility website for tips [0-10, DK, REF]
4. Run laundry with cold water [0-10, DK, REF]
5. Turn off lights when not in use [0-10, DK, REF]
6. Set thermostat to different temperatures for different times of the day [0-10, DK, REF]
7. Use dishwasher only when full [0-10, DK, REF]

## [ASK ALL]

F3. During the past year, how often did you review your electric/gas bill to see your monthly energy consumption? [OPEN END. RECORD, DK, REF]

## G. Demographics/Household Questions

### [ASK ALL]

G1. Do you own or rent your home? [SELECT ONE]

1. Own
2. Rent
3. [Other, specify]

- 98. [Not Sure]
- 99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

[ASK ALL]

G2. Which fuel do you primarily use to heat your home? [SELECT ONE]

- 1. Natural gas from a utility
- 2. Bottled, tank, or liquid propane gas
- 3. Electricity
- 4. Fuel oil, kerosene, etc.
- 5. Coal
- 6. Wood
- 7. Solar energy
- 8. No fuel used
- 97. [Other, specify]
- 98. [Not Sure]
- 99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

[ASK ALL]

G3. About how often do you use the internet? [SELECT ONE, DO NOT ROTATE]

- 1. Several times a day
- 2. About once a day
- 3. 3-5 days a week
- 4. 1-2 days a week
- 5. Every few weeks
- 6. Less than every few weeks
- 7. Never
- 98. [Not Sure]
- 99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

[ASK ALL]

G4. Thinking about news (by news we mean information about events and issues that involve more than just your friends and family), where do you get most of your news? [SELECT ONE, RANDOMIZE]

- 1. Fox News
- 2. CNN
- 3. Facebook
- 4. Local TV
- 5. NBC
- 6. MSNBC
- 7. ABC
- 8. NPR
- 9. CBS
- 10. New York Times
- 11. Local newspapers
- 97. [Other, specify]
- 98. [Not Sure]
- 99. Refused] [FOR WEB: PREFER NOT TO ANSWER]

[ASK ALL]

G5. How often do you ...? [RATING MATRIX, OFTEN, SOMETIMES, HARDLY EVER, NEVER]

1. Read any newspapers in print? [Often (1), Sometimes (2), Hardly ever (3), Never (4), DK (98), REF (99)]
2. Listen to news on the radio? [Often (1), Sometimes (2), Hardly ever (3), Never (4), DK (98), REF (99)]
3. Watch local television news? [Often (1), Sometimes (2), Hardly ever (3), Never (4), DK (98), REF (99)]
4. Get news from a news website or app? [Often (1), Sometimes (2), Hardly ever (3), Never (4), DK (98), REF (99)]
5. Get news from a social networking site (such as Facebook or Twitter)? [Often (1), Sometimes (2), Hardly ever (3), Never (4), DK (98), REF (99)]
6. Listen to internet radio (such as Pandora or Spotify)? [Often (1), Sometimes (2), Hardly ever (3), Never (4), DK (98), REF (99)]
7. Watch YouTube video content? [Often (1), Sometimes (2), Hardly ever (3), Never (4), DK (98), REF (99)]

[ASK ALL]

G6. What type of home do you live in? [READ CATEGORIES, SELECT ONE, ROTATE]

1. Single-family detached house
2. Single-family attached home (such as townhouse)
3. Duplex, triplex or four-plex
4. Apartment or condominium with 5 units or more
5. Manufactured or mobile home
97. [Other, specify]
98. [Not Sure]
99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

[ASK ALL]

G7. Do you live in your home year-round or do you use it on a seasonal basis? [SELECT ONE, ROTATE.]

1. Year-round
2. Seasonal-summer only
3. Seasonal-winter only
4. Seasonal-other [specify]
97. [Other, specify]
98. [Not Sure]
99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

[ASK ALL]

G8. In what year were you born? [NUMERIC OPEN END] [1890-2000]

99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

[ASK ALL]

G9. What is your highest level of education? [SELECT ONE, DO NOT ROTATE]

1. Some high school
1. High school degree
2. Some college or Associate degree
3. College degree

4. Some graduate college
5. Graduate degree or higher
97. [Other, specify]
97. [Not Sure]
98. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

**[ASK ALL]**

G10. What is your race or ethnicity? [MULTIPLE RESPONSE, ROTATE]

1. White (For example, German, Irish, English, Italian, Polish, French, etc.)
2. American Indian or Alaska Native (For example, Navajo Nation, Blackfeet Tribe, Mayan, Aztec, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, etc.)
3. Asian (For example, Chinese, Filipino, Asian Indian, Vietnamese, Korean, Japanese, etc.)
4. Black or African American (For example, African American, Jamaican, Haitian, Nigerian, Ethiopian, Somalian, etc.)
5. Hispanic, Latino, or Spanish origin (For example, Mexican or Mexican American, Puerto Rican, Cuban, Salvadorian, Dominican, Colombian, etc.)
6. Native Hawaiian or Other Pacific Islander (For example, Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, Marshallese, etc.)
7. Middle Eastern or North African (For example, Lebanese, Iranian, Egyptian, Syrian, Moroccan, Algerian, etc.)
8. Some other race, ethnicity, or origin
98. [Not Sure]
99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

**[ASK ALL]**

G11. How would you describe your employment status? Would you say you are ...  
[SELECT ONE, DO NOT ROTATE]

1. Employed full-time,
2. Self Employed full-time
3. Employed part-time
4. Self Employed part-time
5. Temporarily unemployed
6. Not employed
7. Retired
97. [Other, specify]
98. [Not Sure]
99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

**[ASK ALL]**

G12. What is the total combined income in the past 12 months of all members of your household– before taxes and deductions. [SELECT ONE, DO NOT ROTATE]

1. Under \$20,000
2. \$20,000 to under \$30,000
3. \$30,000 to under \$40,000
4. \$40,000 to under \$50,000
5. \$50,000 to under \$60,000

6. \$60,000 to under \$75,000
7. 75,000 to under \$100,000
8. \$100,000 to under \$150,000
9. \$150,000 to under \$200,000
10. Over \$200,000
98. [Not Sure]
99. [Refused] [FOR WEB: PREFER NOT TO ANSWER]

## [ASK ALL]

G13. What is your gender?

1. Female
2. Male
3. Prefer to self-describe [OPEN END]
98. [Not Sure]
100. Refused] [FOR WEB: PREFER NOT TO ANSWER]

## H. Thank You and Closing

### [ASK IF PHONE]

Those are all the questions we have. Before you go, we need to verify your mailing address in case you win one of the fifty \$20 Visa® gift cards. Our records show that you live at [INSERT MAILING ADDRESS]. Is that correct?

1. Yes
2. No [SPECIFY CORRECT ADDRESS: \_\_\_\_\_]
99. [Refused]/[Declined the gift card]

### [ASK IF INTERNET]

Those are all the questions we have. Before you go, please verify your mailing address in case you win one of the fifty \$20 Visa® gift cards. This information will only be used to mail you a gift card if you win one of the fifty gift cards. [READ IN EACH ELEMENT OF NAME & ADDRESS, AND ALLOW EDITS]

Thank you for participating in this survey. [UTILITY NAME] offers a variety of energy efficiency programs that could help you manage your monthly energy bills. For more information on other ways to save, please visit the webpage: <INSERT WEBPAGE>.

## **A.3 NON-RESIDENTIAL IN-DEPTH INTERVIEW GUIDE**

### **August 17, 2018 | NHSaves Market Assessment Non-Residential In-Depth Interview Guide**

**TO:** New Hampshire EM&V **FROM:** Navigant and ILLUME Advising

#### **OVERVIEW**

The research team will conduct in-depth interviews with large commercial, industrial and municipal customers to provide a deeper understanding of the more heterogeneous needs and concerns of this group, relative to small-to-medium non-residential customers. The research will explore motivations and barriers to program participation, and effective marketing and outreach channels to large non-residential customers. It will also explore perceptions of NHSaves, energy efficiency programming, and general attitudes and behaviors with respect to energy efficiency. Finally, it will dig deeper into the energy efficiency upgrades and investment decision making process (including financing considerations) specific to these large customers and how that process influences participation.

While this interview guide will provide a backbone for the interview, ensuring no key points are overlooked, the interview itself will provide the flexibility to allow interviewees to open up new conversation spaces on key topics of interest that we may not have envisioned in designing the guide. Allowing for a structured but free-flowing conversation will generate the most meaningful insights, as this set of customers is highly differentiated and may provide unanticipated insights into motivations, barriers and other topics of interest.

Topics will include: attitudes, beliefs, and behaviors related to energy efficiency and, more generally, the environment; awareness of and experience with NHSaves brand and website; barriers and motivations for investing in energy efficient upgrades, and challenges to program participation specific to large non-residential customers; understanding the decision making and planning process for renovations and capital investments and how the utility can leverage this knowledge to better market to this audience; salience of utility bills and the level of discussion and planning around energy efficiency within the organization; what energy efficiency products and measures these customers are most interested in and identifying any gaps in program offerings; understanding the role financing may play for these large customers.

We will target Facilities Managers and those with direct experience with the energy efficiency upgrade decision and implementation process. All in-depth interviews will be conducted by experienced team members with a deep understanding and connection to the project to enable them to extract the most meaningful information from respondents. Interviews will be recorded and transcribed for data analysis, to identify key themes, trends and response patterns. While interview length will vary based on the respondent's cadence and interest, interviews are intended to last approximately 30 minutes.

We expect these in-depth interviews to take place during September 2018. Timing is contingent on planning, review, approvals, sampling, and recruiting activities.

## OBJECTIVES

We have chosen to conduct in-depth interviews rather than surveys of large non-residential commercial, industrial and municipal customers, because this customer segment is highly varied, faces unique challenges and barriers to participation and widely differing motivations for participating in energy efficiency programs. Due to the large amount of variability in expected responses, a survey format would be overly restrictive. Accordingly, we've crafted a basic outline for topics to be covered in our large non-residential customer in-depth interviews, with the intent of capturing specific, in-depth, unique information and actionable insights about these customers that would not be captured by means of a standard survey.

The following research objectives and questions will guide our in-depth large non-residential customer interviews.

**Table 1. Research Questions Mapping**

Research Objectives	Research Questions	In-Depth Interview Questions
Identify general attitudes, perceptions and behaviors concerning energy efficiency	What are non-residential customer attitudes, perceptions, and behaviors related to energy efficiency?	E1,
	How do non-residential customer segments differ in their attitudes, perceptions, and behaviors related to energy efficiency?	E1, E2, E3,
Understand energy efficiency investment and upgrade decision making process within the organization	What does the decision-making process for energy efficiency upgrades and investments look like within the organization?	I3, O1, E2, D3,
	Who are key decision makers, what are the key decision points, what does the timeline look like?	I1, I3, O1
	How do these factors and considerations affect program participation?	O2, E1, D3,
	Are there actions the utilities could take, information or resources they could provide, that would increase the ease or likelihood of participation within the structure described?	O3, D3,
Develop a deeper understanding of the drivers of energy efficiency program participation and the barriers that impede or prevent participation	In what energy efficiency programs do non-residential customers participate?	D1, D6
	What motivates non-residential customers to participate in energy efficiency programs?	D2, D3, O2
	What keeps non-residential customers from participating in energy efficiency programs?	D4, D5, O2, O3
	How do barriers differ by organization or business type?	D4,



Identify the means for most effectively communicating with customers and different customer segments	How have non-residential customers learned about energy efficiency program offerings?	A1, A4, C1, C2
	What channels do non-residential customers prefer to learn about energy efficiency program offerings? And do these channels differ by business or organization type?	C3
Establish a benchmark for customer awareness level and perceptions of the New Hampshire utilities' statewide energy efficiency program brand, NHSaves and the NHSaves website	What is the level of non-residential customer awareness of the NHSaves brand?	D3, A1, A2, A3, A4, C3
	What are the brand awareness differences across different organization and business types and geographic regions?	A1, A2,
	What is non-residential customer awareness of, and satisfaction with, the NHSaves website?	C4, C5, C6
	What feedback do non-residential customers have regarding the NHSaves website?	C4, C5, C6

## RECRUITMENT SCREENER SCRIPT

Hello, my name is *[Interviewer Name]* with Navigant and I am calling to conduct an interview with you on behalf of <UTILITY> and NHSaves. Please note that this is not a sales call. NHSaves is a statewide program that provides tools, incentives and tips that help you to save energy, money and the environment. We are conducting this survey of large commercial, industrial and municipal organization to gauge current awareness of energy efficiency (EE), EE program offerings and the NHSaves brand. We would like to understand energy efficiency measures you are considering or may have implemented, and how we can help you save energy.

Your organization is able to provide us with valuable insights into how we can better serve large non-residential customers, what your special needs and concerns are, and how we can help, and so we really value your input and time. I am looking to speak with someone who might be involved in any decisions to improve or replace the systems in your facility, such as lighting or air conditioning. May I please speak with the person responsible for making decisions about energy usage at your facility?

The interview should take about 30 minutes and your responses will be kept anonymous. If you prefer, we're happy to schedule an interview at a time that is most convenient for you.

Is it alright with you if I record our conversation, just so I can talk to you more freely without having to write down notes?

***[Interviewer Note: If customer asks about how their information is kept secure, please use the following response, "We maintain safeguards to protect survey responses. These include, for example, physical security of our facilities, technical safeguards to protect electronic data, and manager supervision."]***

## Introduction

I1. Are you the best person to speak to at your business or organization regarding energy usage at your facility?

I2. Is your facility located in New Hampshire?

I3. Does your organization operate a single facility or multiple facilities in the state? (If multiple, clarify with the respondent which facility we are interviewing them about--ie. the facility randomly selected from the utility's customer database)

I3. Please tell me your name, your position within the organization, and how your role relates to your organization's decisions related to energy use at your facility(ies).

I4. Can you tell me a bit about what your business or organization does, and what your facility is like? (e.g. is it an office space, how large is it, is it a production facility, what does it produce, what hours of operation)

I5. Can you tell me a bit about what are the biggest uses of energy at your facility?

## Energy Attitudes, Awareness and Behaviors

E1. How important is energy efficiency to your organization and why?

E2. How often does your organization's management discuss ways to decrease its energy costs or become more energy efficient? What do these conversations look like? (e.g. part of official meetings, ad-hoc discussions, as needed)

E3. How knowledgeable do you feel you are about energy efficiency as it relates to your organization or facility (provide guidance if confused: e.g. knowledgeable about EE opportunities, current EE practices, EE technologies)? Explain.

## Organizational Structure and Decision-Making Process

O1. Can you explain how decisions about upgrades, investments and renovations are made in your organization--key decision makers, decision points and timelines?

O2. Are there any differences in this process when upgrades are related to energy efficiency, or is it pretty much the same process?

O2. How does/might this decision-making process affect your organization's participation in energy efficiency programs?

## Drivers and Barriers

D1. What type of energy efficiency improvements or investments has your organization made within the past few years, and why were these changes made?

D2. What motivations does your organization have for making energy efficient upgrades and investments? (e.g. public image, stakeholder expectations, lower energy costs) If respondent mentions lower energy costs or save money, ask: Is your organization more concerned with lower overall energy costs (kWh charges on your bill), or in lowering demand costs (kW demand charges on your bill?), or do you treat them the same?

D3. When you look to make energy efficiency improvements, do you usually make them through or with the help of an energy efficiency program (utility-sponsored, through NHSaves, etc.)? If yes, what are the benefits? If no, why not?

D4. What barriers can you point to that might keep your organization from participating or wanting to participate in energy efficiency programs to lower energy use at your facility?

D5. Can you think of any ways energy efficiency programs or the utilities that sponsor them could make participation easier for you, or make your firm more likely to participate?

D6. What types of energy efficiency equipment or services is an organization like yours most interested in seeing rebates for? Do you feel these are offered through NHSaves right now, or could program offerings be expanded?

D7. [For firms that mentioned saving on energy costs or bills, and showed some interest in lower demand charges in D2] How interested would your firm be in participating in Demand Response (DR) programs to lower demand charges by having your facility develop a load shedding plan to reduce its demand at key times when called for by the utility? What concerns would you have?

## Awareness and Participation

A1. Have you heard of NHSaves? What do you know about the program and how it can help large businesses like yours? Do you know who sponsors it?

A2. What type of services or equipment do you think you could get assistance with through NHSaves?

A3. Do you know if NHSaves just provides rebates or other services as well? Can you think of any services it offers?

A4. NHSaves is a collaboration of New Hampshire's electric and natural gas utilities working together to provide NH customers with information, incentives, and support designed to save energy, reduce costs, and protect our environment statewide. These programs include both rebates for equipment and energy efficiency audits. Have you ever participated in any NHSaves sponsored programs? If so, when and which programs? Can you tell me a little about your experience participating in the program(s)?

A5. [If yes above] Have you participated in any NHSaves programs since? If so, how recently and what measures did you install? If not, why not?

A6. Overall, what has your experience been like participating in NHSaves programs? Are there any positive experiences you'd like to share? Negative? If negative, what could have been improved?

## Communication and NHSaves Website

C1. How did you hear about NHSaves?

C2. Do you think most large organizations like yours know about NHSaves?

C3. What do you think are the best ways to reach large organizations like yours with information about NHSaves and to make them more aware of what NHSaves can do to help them save energy and money?

C4. Have you visited the NHSaves website?

C5. What information were you looking for when you visited the site, and how useful was the site? Was there anything that wasn't there on the site that you wish had been?

C6. Do you have any suggestions for how to make the website more useful or easy to use?

## Parting Thoughts

P1. Are there any topics you wished we had covered in this interview that we didn't? Or suggestions or information you'd like to share so we can improve programs and better serve customers like yourself?

P2. [For firms operating in multiple states who may have perspective on other states' EE programs] How do you feel NH's EE programs compare with those in other states where your organization operates? Do you have any suggestions for things you've seen work well in other states that you'd like to see NHSaves adopt to serve you better?

It has been a pleasure speaking with you today. If you have any followup questions, or more information you'd like us to hear, please feel free to reach out to me and let me know.

## A.4 NON-RESIDENTIAL SURVEY

### August 3, 2018 | NHSaves Marketing Assessment Non-Residential Survey

#### Instrument

**TO:** New Hampshire EM&V **FROM:** Navigant and ILLUME Advising

#### OVERVIEW AND RESEARCH QUESTIONS

Beginning September 5 and continuing through September 26, 2018<sup>1</sup>, Navigant will conduct surveys with natural gas and electric utility customers who live in New Hampshire. The goal of this survey is to gauge customer awareness of energy efficiency (EE), EE program offerings and the NHSaves® brand, understand customer energy efficiency behaviors and perceptions, determine barriers to program participation, and identify effective means to communicate with customers about NHSaves®. In total, the research team will conduct 300 commercial surveys.

We will work with industry renowned professional survey house Ewald & Wasserman to conduct these surveys. We will send all commercial customers for whom we have contact information a mailed invitation letter with a web address to take the survey. And, when email address is available, we will send an additional email invitation follow-up. Customers receiving these invitations will be directed to the web survey but given the option to call in by phone to complete the survey.

We will aim for a 70/30 split between web and phone completes, though we realize especially for commercial respondents we may have higher phone participation. E&W will call a sample of non-responders directly via telephone to complete an interview. Even if we have a sufficient response rate, we will still call some non-respondents to ensure as representative a sample as possible.

All participants will be offered the opportunity to win one of 25 \$20 Visa gift cards for completing the survey. Surveys will be approximately 15 minutes long. Tables 1 and 2 provide a summary of the survey and sampling plan, while Table 3 provides a mapping of survey questions to research goals and objectives.

**Table 1. Survey Overview**

Section	Description
Statement of purpose	The purpose of this survey is to determine customers' <ul style="list-style-type: none"><li>• overall knowledge and awareness of energy efficiency</li><li>• general attitudes, perceptions and behaviors around energy efficiency</li><li>• motivations for and barriers to program participation</li><li>• effective and preferred channels of communication</li><li>• awareness of NHSaves brand</li></ul>
Qualified respondent	Small to medium-size commercial, industrial and municipal customers
Target number of completes	300 completes

<sup>1</sup> Survey fielding timeline contingent upon utility data review, sampling, and any additional data requests.

Estimated survey length	15 minutes
Survey timeline	August 2018

## SAMPLE

The survey will be fielded via telephone, and online platform, with a random sample of small municipal, small industrial and small to medium-size commercial customers in the New Hampshire utilities service territory.

This table defines the sampling approach and incentives.

**Table 2. Sample Plan**

Topic	Population
Sample size	Navigant will target completing 300 surveys of small to medium-size commercial, industrial and municipal customers across the four utilities (Eversource, Liberty Utilities, New Hampshire Electric Co-op and Unitil).
Incentives	As a token of our appreciation, the participants who complete the survey will be placed in a random drawing to win one of 25 \$20 prepaid Visa gift cards.
Stratification	Navigant will stratify, as needed, by utility and/or business category (municipal and commercial) so that the target proportion of surveyed customers is representative of the small business and municipal population in New Hampshire.

## SURVEY OVERVIEW

This table defines the research objectives for each set of survey questions.

**Table 3. Objectives, Research Questions and Sections Mapping**

Research Objectives	Research Questions	Sections
Assess overall knowledge and awareness of energy efficiency	How aware and knowledgeable are NH nonresidential customers about energy efficiency and program offerings?	EE2, EE3, EE6, NH1, NH2, NH3, NH4, NH5, NH6, NH7, NH9, NH10, PP1, PP1a, PP2
	What are the differences in awareness and knowledge of energy efficiency across non-residential sub-populations such as municipal and small business, or different organization types?	F1
	What differences are there in the level of energy efficiency awareness and knowledge by geographic region?	F10

Identify general attitudes, perceptions and behaviors concerning energy efficiency	What are non-residential customer attitudes, perceptions, and behaviors related to energy efficiency?	EE1, EE3, EE4, EE5, EE6, EE6a
	How do non-residential customer segments differ in their attitudes, perceptions, and behaviors related to energy efficiency?	F1, F2, F3, F4, F5, F6, F7, F8, F9
Develop a deeper understanding of the drivers of energy efficiency program participation and the barriers that impede or prevent participation	In what energy efficiency programs do non-residential customers participate?	PP2, PP3, PP6, PP7
	What motivates non-residential customers to participate in energy efficiency programs?	EE1, EE4, EE5, EE6, PP8, PP9, PP10A, PP10B, PP10C, PP11, PP12
	What keeps non-residential customers from participating in energy efficiency programs?	EE6a, PP10a, PP10b, PP10c
	How do barriers differ by business or organization type?	F1, F2, F3, F4, F5, F6, F7, F8, F9, F10
Identify the means for most effectively communicating with customers and different customer segments	How have non-residential customers learned about energy efficiency program offerings?	EE7, NH0, NH4, NH7, PP5, PP9
	What channels do non-residential customers prefer to learn about energy efficiency program offerings? And do these channels differ by population segment?	EE7, PP5, PP9
	What is non-residential customer awareness of the NHSaves website?	NHW1, NHW2
	What feedback do non-residential customers have regarding the NHSaves website?	NHW4, NHW5
	What is the level of non-residential customer satisfaction with the NHSaves website?	NHW4
Establish a benchmark for customer awareness level of the New Hampshire utilities'	What is the level of non-residential customer awareness of the NHSaves brand?	NH1, NH2, NH3, NH4, NH5, NH7, NH11

statewide energy efficiency  
program brand, NHSaves

---

What are the brand awareness differences across key non-residential sub-populations such as municipal versus small business, and different business types?

---

F1, F2, F3, F4, F5, F6,  
F7, F8, F9

---

What are the brand awareness differences by geographic region?

---

F10

---



## PHONE INTRODUCTION

Hi, this is [*Interviewer Name*] from Ewald & Wasserman and I am calling to conduct a brief survey on behalf of <UTILITY> and NHSaves. NHSaves is a statewide program that provides tools, incentives and tips that help you to save energy, money and the environment. We are conducting a survey to gauge current awareness of energy efficiency (EE), EE program offerings and the NHSaves brand. We would like to understand energy efficiency measures you are considering or may have implemented, and how we can help you save energy.

Upon completion of this survey, you will be entered into a drawing to win one of 25 \$20 Visa gift cards. Please note that this is not a sales call. (IF NECESSARY: I am looking to speak with someone who might be involved in any decisions to improve or replace the systems in your facility, such as lighting or air conditioning.) May I please speak with the person responsible for making decisions about energy usage at your facility?

The questions should take about 15 minutes and your responses will be kept anonymous.

***[Interviewer Note: If customer asks about how their information is kept secure, please use the following response, "We do not record the audio of these calls and we maintain safeguards to protect survey responses. These include, for example, physical security of our facilities, technical safeguards to protect electronic data, and manager supervision."]***

## INVITATION FOR ONLINE RESPONDENTS

### Initial invitation

Subject: <UTILITY> and NHSaves want to help you save energy!

Dear <NAME>,

We would like your feedback in a brief statewide survey regarding energy efficiency. Your participation is very important to us and the region, and the survey should only take 15 minutes to complete.

**Customers who complete the survey by [DATE] will have a chance to win one of 25 \$20 Visa Gift Cards!\*** By taking a few minutes, you will be adding greatly to our understanding of how to help organizations like yours reduce their costs and save energy.

To complete this 15-minute survey, please click on the button or enter the webpage address below into your Internet browser and then type in the LoginID to begin the survey. (NOTE: Please make sure to allow for popups.)

Your input is very important to us and will be kept strictly confidential. We will use your feedback to help improve our commercial programs for customers like you.



Click [HERE](#) to take the survey

Webpage address: < TBD >

LoginID: <#####>

If you prefer to complete the survey by phone, you may do so by calling us at 866.637.6393. Alternatively, you can follow the link [HERE](#) to take the survey.

Thank you for taking the time to complete the survey!

Sincerely,

<UTILITY CONTACT NAME>  
<UTILITY NAME>

Katrin Ewald, PhD  
Project Director, Ewald & Wasserman

*<UTILITY> has hired Ewald & Wasserman, a professional research firm, to help conduct this study. If you have any questions about how to respond to this survey, please contact Ewald & Wasserman at 866.637.6393 or email at [study@eandwresearch.com](mailto:study@eandwresearch.com). If you have any questions about this study, you can also contact a <UTILITY> staff member, <UTILITY CONTACT NAME>, at <UTILITY CONTACT PHONE NUMBER>.*

*\*Estimated odds of winning are 1:275 for the \$20 gift card. (Actual odds depend on the number of survey participants.)*

## First Reminder EMAIL

Subject: <UTILITY> needs your feedback  
Dear [FIRST AND LAST NAME],

<UTILITY> and NHSaves are working hard to help businesses and organizations like yours to save money and energy. Recently, we sent you an invitation to take a survey regarding your company's thoughts on energy efficiency. We are now in the last days of collecting customer feedback and want to hear from you.

Please take about 15 minutes today to complete the survey. **Customers who complete the survey by [DATE] will have a chance to win one of 25 - \$20 Visa Gift Cards! \***

Your input is very important to us and will be kept strictly confidential. We will use your feedback to help improve our commercial programs for customers like you.

Click [HERE](#) to take the survey

Or copy and paste the URL below into your internet browser:

Webpage address: < TBD >

LoginID: <#####>

If you prefer to complete the survey by phone, you may do so by calling us at 866.637.6393.

Thank you for taking the time to complete the survey!

Sincerely,

<UTILITY CONTACT NAME>      Katrin Ewald, PhD  
<UTILITY NAME>                Project Director, Ewald & Wasserman

*UTILITY> has hired Ewald & Wasserman, a professional research firm, to help conduct this study. If you have any questions about how to respond to this survey, please contact Ewald & Wasserman at 866.637.6393 or email at [study@eandwresearch.com](mailto:study@eandwresearch.com). If you have any questions about this study, you can also contact a <UTILITY> staff member, <UTILITY CONTACT NAME>, at <UTILITY CONTACT PHONE NUMBER>.*

*\*Estimated odds of winning are 1:275 for the \$20 gift card. (Actual odds depend on the number of survey participants.)*



## Second Reminder EMAIL

Subject: <UTILITY> wants to help you save money!

Dear [FIRST AND LAST NAME],

<UTILITY> and NHSaves are working hard to help businesses and organizations like yours to save money and energy. Recently, we sent you an invitation to take a survey regarding your company's thoughts on energy efficiency. We are now in the final days of collecting customer feedback and want to hear from you.

Please take about 15 minutes today to complete the survey. **Customers who complete the survey by [DATE] will have a chance to win one of 25 - \$20 Visa Gift Cards! \***

Your input is very important to us and will be kept strictly confidential. We will use your feedback to help improve our commercial programs for customers like you.

Click [HERE](#) to take the survey

Or copy and paste the URL below into your internet browser:

Webpage address: < TBD >

LoginID: <#####>

If you prefer to complete the survey by phone, you may do so by calling us at 866.637.6393.

Thank you for taking the time to complete the survey!

Sincerely,

<UTILITY CONTACT NAME>      Katrin Ewald, PhD  
<UTILITY NAME>                Project Director, Ewald & Wasserman

*<UTILITY> has hired Ewald & Wasserman, a professional research firm, to help conduct this study. If you have any questions about how to respond to this survey, please contact Ewald & Wasserman at 866.637.6393 or email at [study@eandwresearch.com](mailto:study@eandwresearch.com). If you have any questions about this study, you can also contact a <UTILITY> staff member, <UTILITY CONTACT NAME>, at <UTILITY CONTACT PHONE NUMBER>.*

*\*Estimated odds of winning are 1:275 for the \$20 gift card. (Actual odds depend on the number of survey participants.)*

## WEB INTRODUCTION

Thank you for your interest in this survey. We would like your feedback in a brief statewide survey regarding energy efficiency. Your participation is very important to us and the region, and the survey should only take 15 minutes to complete.



**Customers who complete the survey by [DATE] will have a chance to win one of 25 \$20 Visa Gift Cards!\*** By taking a few minutes, you will be adding greatly to our understanding of how to help businesses and organizations like yours reduce their costs and save energy.

To complete this 15-minute survey, please click on the button or enter the webpage address below into your Internet browser and then type in the LoginID to begin the survey. (NOTE: Please make sure to allow for popups.)

Your input is very important to us and will be kept strictly confidential. We will use your feedback to help improve our commercial programs for customers like you.

## SECTION A. SCREENERS

S1. Are you the best person for your organization or business to discuss the energy usage at your facility?

1. Yes
2. No
98. Not Sure
99. Refused

[ASK IF S1=2,98 OR 99]

S1a. Is there someone else at your business or organization who is knowledgeable about the facility's energy usage?

[OPEN END, collect name and contact information. Upon collection of data, thank and terminate]

S2. Do you operate your business or organization in a residential, commercial or government owned/municipal space?

1. Residential
2. Non-residential
3. Government owned/Municipal
97. Other, please specify [OPEN END]
98. Not Sure
99. Refused

S3. Is your business or organization located in New Hampshire?

1. Yes
2. No, no locations or facilities are in New Hampshire [Thank and Terminate]
3. Some locations or facilities are in New Hampshire
98. Not Sure [Thank and Terminate]
99. Refused [Thank and Terminate]

[If S3=3]

S4. What state do you work in?

1. New Hampshire
97. Other, please specify [OPEN END]
99. Refused

S5. What is your position within the organization or business?

1. Business owner
2. Office Manager
3. Receptionist/Administrative Assistant/Clerical
4. Facilities/energy manager
97. Other, please specify: [OPEN END]
98. Not Sure
99. Refused

## SECTION B. NHSAVES AWARENESS

[ASK ALL]

NH1. Have you seen or heard the term “New Hampshire Saves” or “NHSaves”?

1. Yes
2. No [SKIP TO NHW1]
98. Not Sure [SKIP TO NHW1]
99. Refused [SKIP TO NHW1]

[IF NH1 =1, CONTINUE. ELSE SKIP TO NHW1]

[FOR WEB ONLY]

NH2. Before taking this survey, do you recall having seen this logo? [SELECT ONE ONLY]



1. Yes
2. No
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

NH3. On a scale of 0 to 10, where 0 means “not at all familiar”, and 10 means “very familiar”, how familiar are you with the statewide energy efficiency program campaign, New Hampshire Saves (NHSaves)?

[SCALE 0-10; 98=Not Sure, 99=REFUSED]

NH4. Which of the following do you associate with NHSaves?

[READ ALL, ROTATE, PICK ALL THAT APPLY]

1. An energy assessment program
2. Rebates on high-efficiency equipment and products
3. Resource for energy efficiency information, services, and rebates
4. A way to lower energy bills
5. An easier way to save energy
6. Energy efficient equipment proposals
7. Turnkey retrofits (i.e. one-stop shopping for upgrading a specific system)
97. Other, please specify [OPEN END]
98. Not Sure
99. Refused

NH5. To the best of your knowledge, does NHSaves offer solutions for your business, your home or both? [SELECT ONE ONLY]

1. My business ONLY
2. My home ONLY
3. Both
97. Other, specify: [OPEN END]
98. Not Sure
99. Refused

NH6. How did you first learn about NHSaves?

[SELECT ONE]

1. Electric utility
2. Gas utility
3. State government
4. Local government
5. Friend, family member, or colleague
6. Google or web search
7. Trade Show
8. Speaking engagement
97. Other, specify: [OPEN END]
98. Not Sure
99. Refused

NH7. Please name any organizations that you think sponsor NHSaves. A best guess is fine.

[ALLOW MULTIPLE ANSWERS]

1. Utility company
2. State government
3. Federal government
4. Non-profit organization
97. Other, specify: [OPEN END]
98. Not Sure
99. Refused

NH9. We're interested in all the places where you may have heard about how NHSaves can help you save energy at your business. Have you ever

[ROTATE 1-10, SELECT ALL THAT APPLY]

1. Seen an article or advertisement for NHSaves in a business journal or magazine?
2. Seen advertising or a page on Facebook or other social media?
3. Seen online advertising, videos, or infographics about NHSaves?
4. Heard about NHSaves on the radio?
5. Received an email about NHSaves?
6. Received bill insert?
7. Received a direct mailer?
8. Received marketing materials/sales sheets?
9. Heard about NHSaves at an NH Legislation/State-sponsored event?
10. Heard about NHSaves at another type of event? please specify [OPEN END]
97. Heard about NHSaves somewhere else? Specify where: [OPEN END]
98. Not Sure

99. Refused [FOR WEB: PREFER NOT TO ANSWER]

[IF ALL NH9\_1-NH9\_97 = Not selected SKIP TO NH11]

NH10. Do you think the messages you heard were clear?

1. Yes
2. No
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

NH11. On a scale from 0 to 10 where 0 is “not at all motivating” and 10 is “very motivating,” how motivating do you find the following statement?

“It pays to be energy efficient.”  
[SCALE of 0-10, 98 = Not Sure, 99 = Refused]

## SECTION C. NHSAVES WEBSITE AWARENESS

NHW1. Did you know that there is a website called NHSaves.com? [SELECT ONE ONLY]

1. Yes
2. No [SKIP TO PP1]
98. Not Sure [SKIP TO PP1]
99. Refused [FOR WEB: PREFER NOT TO ANSWER] [SKIP TO PP1]

[SKIP TO PP1 IF NHW1= 2, 98, 99]

[ASK IF NHW1= 1]

NHW2. Have you ever visited the website called NHSaves.com? [SELECT ONE ONLY]

1. Yes
2. No [SKIP TO NHW6]
98. Not Sure [SKIP TO NHW6]
99. Refused [FOR WEB: PREFER NOT TO ANSWER] [SKIP TO NHW6]



[ASK IF NHW2 = 1, ELSE SKIP TO NHW6]

NHW3. When you visited the NHSAVES website, what information were you searching for? [SELECT ALL THAT APPLY. ROTATE]

1. Information on rebates and incentives for my business or organization
2. Information on energy assessments for my organization or business
3. Information in the NHSAVES blog
4. Information on energy efficiency tips
5. Information on local events
97. Other, specify [OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

NHW4. On a scale of 0 to 10, where 0 means “not at all agree” and 10 means “completely agree”, please rate your level of agreement with the following statements: [RECORD 0-10, 98 = NOT SURE, 99 = REFUSED]

1. It was easy to find the information I needed on the NHSaves website. [0-10, DK, REF]
2. The information from the NHSaves website was useful. [0-10, DK, REF]
3. I am completely satisfied with my experience with the NHSaves website. [0-10, DK, REF]
4. I would recommend the NHSaves website to a friend or family member. [0-10, DK, REF]

NHW5. We'd love to hear your feedback on your experience with the website. Was there anything missing or unclear on the NHSaves website that you think could be improved? Please elaborate on your answer.

1. Yes--please specify [OPEN END]
2. No
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

**Intro for NHW6.**

I appreciate your feedback. NHSaves is a collaboration of New Hampshire's electric and natural gas utilities working together to provide NH customers with information, incentives, and support designed to save energy, reduce costs, and protect our environment statewide. These programs are designed help customers save money by providing energy audits and rebates for installing energy efficient equipment.

NHW6. Were you aware of this before this call? [SELECT ONE ONLY.]

1. Yes
2. No
97. Other, please specify [OPEN END]
98. Not sure
99. Refused

NHW7. And based on this general description, do you have a very favorable, somewhat favorable, somewhat unfavorable opinion, or a very unfavorable opinion of NHSaves? [SELECT ONE ONLY.]

1. Very favorable
2. Somewhat favorable
3. Somewhat unfavorable
4. Very unfavorable
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

## SECTION D. AWARENESS OF, AND ATTITUDES TOWARDS, ENERGY EFFICIENCY

EE1. On a scale of 0 to 10, where 0 means "not at all important", and 10 means "very important", how important is energy efficiency to your business?

[SCALE 0-10; 98=Not Sure, 99=REFUSED]

EE2. On a scale of 0 to 10, where 0 means "not at all knowledgeable", and 10 means "very knowledgeable", how would you rate your knowledge around energy efficiency?

[SCALE 0-10; 98=Not Sure, 99=REFUSED]

EE3. On a scale of 0 to 10, where 0 means "never", and 10 means "constantly", how often does your organization's management discuss how to reduce its energy costs?

[SCALE 0-10; 98=DON'T KNOW, 99=REFUSED]

EE4. Has your facility or organization made any energy efficiency improvements or investments in the past three years?

1. Yes
2. No [SKIP TO EE6]
98. Not Sure [SKIP TO EE6]
99. Refused [FOR WEB: PREFER NOT TO ANSWER] [SKIP TO EE6]

[IF EE4=1]

EE5. What was the main reason for making energy efficiency changes or investments?

[ROTATE PRESENTATION, MULTIPLE RESPONSE ALLOWED, SELECT ALL THAT APPLY]

1. Saving money
2. Saving energy
3. Public relations
4. Organization's image
5. Protecting the environment
6. For the benefit of future generations
7. Reducing our dependence of foreign oil
8. Helping New Hampshire lead the way on saving energy
9. Improving efficiency
10. Reducing air pollution
11. New technology
12. Equipment failure--forced to make investment
13. Had available capital budget for planned expansion/renovation
97. Other, specify:[OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

EE6. What changes in equipment, appliances or technology, or behavior changes, in your facility or organization, do you think would save the most energy (if the cost was not an issue)? [OPEN-END]

1. [OPEN-END--Record Response]
2. None [SKIP TO EE7]
98. Not Sure [SKIP TO EE7]
99. Refused [FOR WEB: PREFER NOT TO ANSWER] [SKIP TO EE7]

[IF EE6=1]

EE6a. What barriers have kept your facility or organization from making these changes? [ROTATE PRESENTATION, ALLOW MULTIPLE RESPONSE, SELECT ALL THAT APPLY]

1. Budgetary reasons
2. The equipment is still working
3. Your company takes time to make decisions like these
4. You're not sure what equipment should be upgraded first
5. The incentive information is hard to find
6. Incentives are not large enough
7. Staffing constraints
8. Lack of know-how, not understanding what was needed
97. Other, please describe: [OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

EE7. If you wanted to know more about how to lower your organization or facilities energy usage or bills, where would you look for information?

SELECT ALL THAT APPLY  
[MULTIPLE RESPONSE, ROTATE]

1. Electric utility
2. Gas utility
3. Utility website
4. Utility 800 number
5. Government
6. NHSaves website/NHSaves.com
7. Search engine such as Google or Yahoo
8. Friends, family, coworkers
9. Contractor
10. Architect/Engineer
11. Energy bill
12. Trade Allies/Associations
96. I wouldn't look up any information
97. Other, please specify: [OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

## SECTION E. PROGRAM PARTICIPATION AND CHANNELS FOR COMMUNICATION

PP1. Prior to this call, did you know that there were programs, solutions, and incentives to help organizations and facilities in New Hampshire save energy?

1. Yes
2. No [SKIP TO PP9]
98. Not Sure [SKIP TO PP9]
99. Refused [FOR WEB: PREFER NOT TO ANSWER] [SKIP TO PP9]

[SKIP TO PP9 IF PP1= 2, 98, 99]

PP1a. Who offers the energy saving programs in New Hampshire you are aware of?

[MULTIPLE RESPONSE, SELECT ALL THAT APPLY]

1. NHSAVES
2. Electric utilities
3. Gas utilities
4. Coops
5. ARRA
97. Other, please specify: [OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

PP2. What type of help or assistance do these programs, solutions, and incentives offer?

[MULTIPLE RESPONSE, RECORD ALL THAT APPLY]

1. Energy assessments
2. Rebates/incentives/loans/cost savings for efficient equipment
3. Saving energy/general efficiency tips
4. Rebates/incentives/programs for lighting upgrades
5. Rebates/incentives/programs for appliance upgrades
6. Rebates/incentives/programs for heating and cooling upgrades
97. Other, please specify: [OPEN END]
98. Not sure
99. Refused

PP3. What types of programs are you aware of?

[MULTIPLE RESPONSE, ROTATE OPTIONS]

1. Lighting Rebates
2. New Construction Rebates
3. Energy Audits or Assessments
4. Retrofit Rebates for air compressors, motors, VFDs, or industrial process equipment
5. Retrofit Rebates for water heating or space heating/cooling equipment or controls
6. Retrofit Rebates for kitchen equipment
7. Weatherization or Insulation Rebates
8. Custom Commercial Project Rebates
96. None [SKP PP9]
97. Other, please specify: [OPEN END]
98. Not Sure [SKP PP9]
99. Refused [FOR WEB: PREFER NOT TO ANSWER] [SKP PP9]

[ASK IF PP3 = 1-8 or 97, ELSE SKIP TO PP9]

PP4. Did you hear about these utility programs, solutions, or incentives through NHSaves marketing?

1. Yes
2. No [SKIP TO PP6]
98. Not Sure [SKIP TO PP6]
99. Refused [FOR WEB: PREFER NOT TO ANSWER] [SKIP TO PP6]

[IF PP4=1]

PP5. How did you hear about NHSaves programs? [DO NOT READ, SELECT ALL THAT APPLY. OPEN END TEXT RESPONSE FOR WEB SURVEY]

1. My utility's website
2. My utility's bill insert
3. My utility's letter or postcard separate from monthly bill)
4. My utility's email
5. My utility's employee, account representative, customer service representative)
6. Past participant
7. Installation contractor/Trade ally/Builder
8. Energy equipment vendor or salesperson
9. Energy advisor
10. Manufacturer
11. Newspaper/magazine/print media
12. Family/friends/word of mouth
13. Social media
14. Internet - Banner ad/Google ad/Bing ad
15. Internet – Other
16. Community or association event/meeting/presentation
17. Seminar, conference
97. Other, please describe: [OPEN END]
98. Not Sure
99. Refused

PP6. Has your facility participated in any of the NHSaves programs we've discussed? If your business has participated in multiple programs, please select/tell me any of the following that apply.

[SELECT ALL THAT APPLY]

1. Yes, we are currently participating in a program
2. Yes, we participated in a program within the last year
3. Yes, we participated in a program more than a year ago
4. No, we have never participated in a program [SKIP TO PP9]
98. Not Sure [SKIP TO PP9]
99. Refused [FOR WEB: PREFER NOT TO ANSWER] [SKIP TO PP9]

[IF PP6 = 1 or 2 or 3]

PP7a. Which of these programs have you participated in?

[SELECT ALL THAT APPLY]

1. Lighting Rebates
2. New Construction Rebates
3. Energy Audits or Assessments
4. Retrofit Rebates for air compressors, motors, VFDs, or industrial process equipment
5. Retrofit Rebates for water heating or space heating/cooling equipment or controls
6. Retrofit Rebates for kitchen equipment
7. Weatherization or Insulation Rebates
8. Custom Commercial Project Rebates
97. Other specify: [OPEN END]
98. Not sure [SKIP TO PP9]
99. Refused [SKIP TO PP9]

[ASK PP7b\_x FOR EACH PROGRAM SELECTED IN PP7a]

PP7b\_x. When did you participate in the <<PROGRAM FROM PP7A>> program? [SELECT ONE]

1. Currently participating
2. Participated in the last year
3. Participated 2 to 5 years ago
4. Participated more than 5 years ago
98. Not sure
99. REFUSED

[IF PP6 = 1 or 2 or 3]

PP8. What motivated you to participate in [IF PP7 SELECTION >1 USE "THESE", ELSE USE "THIS"] these programs?

[ROTATE PRESENTATION, MULTIPLE RESPONSE ALLOWED, RECORD ALL THAT APPLY]

1. The rebate/incentive
2. Improve the efficiency of our equipment
3. Reducing energy helps protect the environment
4. Gain more knowledge on our energy usage
5. Save money on energy bills
6. Support offered by the program staff
97. Other, please describe: [OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

[ASK ALL]

PP9. What is the best way to reach facilities like yours to let them know about the NHSaves programs? Is there another way that would be good to reach facilities like yours?

[DO NOT READ, ACCEPT MULTIPLE RESPONSES, RECORD ORDER. FREE TEXT RESPONSE FOR WEB SURVEY]

1. My utility's website
2. NHSaves website
3. Listen to Internet Radio (Pandora, Spotify)
4. Trade Publications, please specify: [OPEN END]
5. My utility's bill inserts
6. Letter or postcard from my utility, separate from monthly bill
7. Email from my utility
8. A call from my utilities' employee, account representative, customer service representative
9. Past Participant
10. Installation Contractor/Trade Ally/Builder
11. Energy Equipment Vendor or Salesperson
12. Retail Stores
13. Energy Advisor
14. Manufacturer
15. Newspaper/magazine/print media
16. TV/Radio Ads
17. Family/friends/word of mouth
18. Social Media
19. Internet - Banner ad/Google ad/Bing ad
20. Internet – Other, specify [OPEN END]
21. Community or trade association event/meeting/presentation
22. Seminar, conference
97. Other, please describe: [OPEN END]
98. Not Sure
99. Refused

[IF PP6 = 4, 98, 99] SKIP TO PP10c

[IF PP1 = 2, 98, 99] SKIP TO PP11

[IF PP6 = 1 or 2 AND PP6 = 3]

PP10a. You indicated you are a current/ recent participant in a program, and that you have also participated in a program in the past. What motivates to you keep participating in programs? [ROTATE ORDER, MULTIPLE RESPONSE]

1. Positive experience in program
2. Saved energy/want to keep saving energy
3. Lower energy bills
4. Protects the environment
5. Part of organization's goals to be energy efficient
6. Utility staff
97. Other, please describe: [OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

[IF PP6 = ONLY 3]

PP10b. You indicated you had participated more than a year ago, but not since. Why haven't you participated recently? [ROTATE ORDER, MULTIPLE RESPONSE]

1. Poor experience in program
2. Did not save as much as hoped in program
3. Don't have a reason to--already energy efficient
4. Not ready to make any more equipment upgrades yet
5. Incentives not large enough
6. Lack of up-front cash/need financing
97. Other, please describe: [OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

[SKIP TO PP11]

[IF PP6=4, 98, 99]

PP10c. You indicated that you have not participated in programs. What barriers keep you from participating in energy efficiency programs?

[MULTIPLE RESPONSE, DO NOT READ. FREE TEXT RESPONSE FOR WEB SURVEY]

1. Budgetary reasons
2. The equipment is still working
3. Equipment already energy efficient
4. Company takes time to make decisions like these
5. Not sure what equipment should be upgraded first
6. The incentive information is hard to find
7. Incentives are not large enough
8. Time constraints
9. Lack of financing tools
97. Other, please describe: [OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

[ASK ALL]

PP11. What (if any) benefits do you think there are to be participating in NHSaves energy efficiency programs?

[MULTIPLE RESPONSE, SELECT ALL THAT APPLY]

1. The rebate/incentive
2. Improve the efficiency of our equipment
3. Reducing energy is protects the environment
4. Gain more knowledge on our energy usage
5. Improved productivity
6. Improved or safer working environment
97. Other, please describe: [OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

PP12. Is there anything that would make you more likely to participate in the future?

[MULTIPLE RESPONSE, DO NOT READ. FREE TEXT RESPONSE FOR WEB SURVEY]



1. More information about energy efficiency measures available through the program
2. Quantified energy savings for your particular project
3. Higher incentives
4. More equipment choices
5. More information or communication about what other facilities managers are doing
6. A comparison of how much energy your facility is saving compared to the industry in general
7. Walk-through energy audits
8. Low interest financing program
9. Technical assistance
97. Other, please describe: [OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

## SECTION F. FIRMOGRAPHICS

We're almost finished. I have a few final questions about your facility or organization and your facility.

F1. What type of facility or organization do you operate?

[SELECT ONE READ LIST IF NEEDED]

1. Data Center
2. Retail outlet
3. Laboratory
4. School or university
5. Healthcare or hospital
6. Hotel or motel
7. Industrial or manufacturing
8. Property management agency
9. Restaurant or food service
10. Warehouse, wholesaler, or storage
11. Grocery store
11. Municipal
97. Other, please describe: [OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

F2. Does your organization own or lease this facility? [SINGLE RESPONSE]

1. Company owns facility [Skip to F4]
2. Company leases facility
3. Facility government owned
97. Not Sure
98. Refused [FOR WEB: PREFER NOT TO ANSWER]

[IF F2<>1, ELSE SKIP TO F4]

F3. Is your facility managed by a property management firm? [SINGLE RESPONSE]

1. Yes
2. No
98. Not Sure

99. Refused [FOR WEB: PREFER NOT TO ANSWER]

F4. What is your facility's primary heating fuel? [SINGLE RESPONSE]

1. Natural gas
  2. Propane
  3. Oil
  4. Electric
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

[ASK IF F2=2]

F5. Does your facility or organization pay its own electric bill or is it included in your rent? [SINGLE RESPONSE]

1. Pays own bill
2. Bill is included in rent
3. Not relevant, please explain [OPEN END]
98. Not Sure
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

[ASK IF F2=2 AND F4=1]

F6. Does your organization or facility pay its own natural gas bill or is it included in your rent? [SINGLE RESPONSE]

1. Company pays own bill
2. Bill is included in rent
3. Don't use gas
98. Don't know
99. Refused [FOR WEB: PREFER NOT TO ANSWER]

F7. How many employees, full plus part-time, are employed at your facility in NH? [SINGLE RESPONSE]

1. 1 – 10
2. 11- 25
3. 26 – 50
4. 51 – 100
5. 101 – 500
6. More than 500

F8. What is the approximate square footage of your facility?

[IF NEEDED: For the facility where you are now. Your best guess is fine.]

[NUMERIC OPEN END]

F9. Which of the following categories best describes your organization's revenue in 2017? [SINGLE RESPONSE]

1. Less than \$100,000
2. \$100,000 to less than \$500,000
3. \$500,000 to less than \$1 million
4. \$1 million to less than \$5 million
5. \$5 million to less than \$10 million
6. \$10 million to less than \$20 million
7. More than \$20 million
8. Not applicable--municipal, not a business

F10. What is the ZIP code of your facility?

[NUMERIC OPEN END]

## CLOSING

END1. Do you have any additional comments or questions about NHSaves program that you would like me to pass along?

1. Yes [RECORD RESPONSE]
2. No

END1. Those are all the questions that I have for you. Thank you so much for your time and feedback. If needed, would it be OK if we contacted you again to clarify something that I may have missed?

1. Yes
2. No

Thank you for your willingness to participate in the survey. Those are all the questions I have for you today. On behalf of NHSaves, thank you for your time and cooperation.

### [ASK IF PHONE]

Those are all the questions we have. Before you go, please tell me your mailing address so we can mail you one of the 25 \$20 gift cards.

Name:

Address:

### [ASK IF INTERNET]

Those are all the questions we have. Before you go, please tell us your mailing address in case you win one of the 25 \$20 Visa® gift cards. This information will only be used to mail you a gift card if you win one of the 25 gift cards.

Name:

Address:

Thank you for participating in this survey. [UTILITY NAME] offers a variety of energy efficiency programs that could help you manage your monthly energy bills. For more information on other ways to save, please visit the webpage: <INSERT WEBPAGE>.