



5021

Liberty Utilities – New Hampshire Electric Customer Satisfaction – Final Report

October 2014

LUTH
research

Contents

1. Objectives & Methodology

2. Key Findings & Recommendations

3. Detailed Findings

4. Appendix – Respondent Profile

Objectives & Methodology

Objectives

- Analyze current customer satisfaction levels with Liberty Utilities among New Hampshire (NH) Electric customers.
- Compare current satisfaction levels with previous years to determine whether satisfaction significantly increased or not over time.

Methodology

- A total of 1,508 surveys from Liberty NH Electric customers were completed.
- 88% of interviews were completed via phone and 12% were completed online.*
- The study was fielded from September 16, 2014 to October 11, 2014.
- Statistical significance was tested at the 95% level.

* Last year NH Electric provided 14,972 usable online records. This year, they only provided 2,735.

Objectives & Methodology

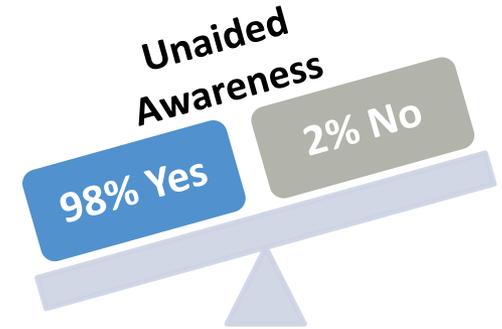
- This is the third year of performance tracking for services rendered to Liberty Utilities' Electric customers in New Hampshire. Data from 2014 is compared throughout the report to data from 2012 and 2013.
- Residential customers were randomly selected from a sample provided by Liberty Utilities for participation in the survey. The survey sample was representative of Liberty Utilities' New Hampshire Electric customers.
- Base counts throughout this report refer to total responding, eliminating those who were not asked the question due to a skip pattern.
- Sampling Error
 - As is the case in all survey samples, there is an element of sampling error that is known and measurable when making projections to the population of all Liberty Utilities' NH Electricity customers. Sampling error varies inversely with the size of the sample.
 - With a sample size of 1,508 and a 95% level of confidence, the range of error for proportions observed in this survey is +/- 2.53 percentage points.

KEY FINDINGS & RECOMMENDATIONS

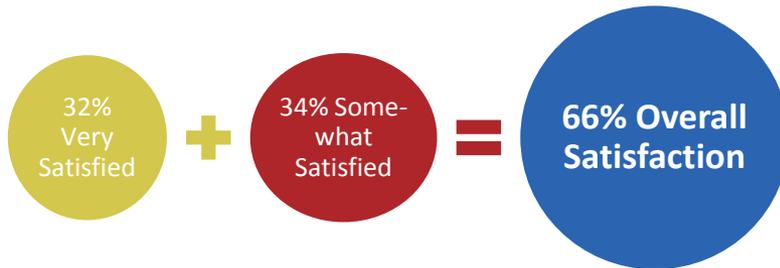
Overall Services and Company

Awareness of Liberty Utilities is almost 100%.

- Almost all (98%) customers were aware that Liberty Utilities was their electric utility company. This was a slight increase from 2013 (93%), and a significant increase from 2012 (73%).
- When prompted, 70% of customers who initially answered “National Grid” were aware of the name change.



Cost of service has a negative effect on overall satisfaction – which is at an all time low.



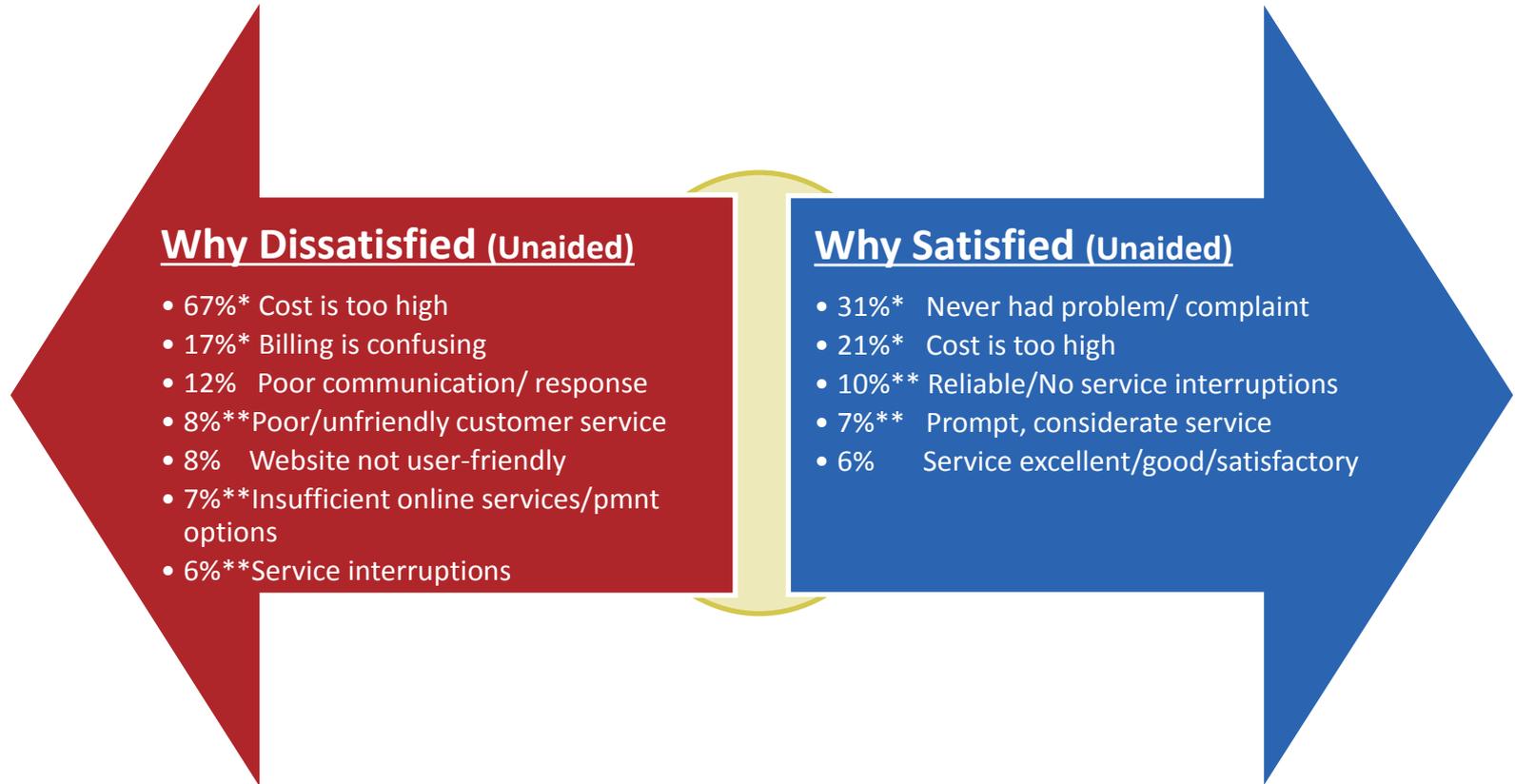
- Overall satisfaction with Liberty Utilities was lower in 2014, at 66%, compared to 78% in 2013. There was a significant decrease of very satisfied customers observed from 2012 to 2014 – 56% trending down to 32%.
- Price did have a significant impact on satisfaction scores as overall satisfaction rose to 73% when customers were asked to exclude price as part of their evaluation.



Reasons for Satisfaction/Dissatisfaction

The top reason cited for overall satisfaction was customers never having a problem or complaint (31% vs. 23% in 2013). Additionally, satisfied customers felt the service was reliable (10%), prompt (7%), and satisfactory, good, or excellent (6%). However, a high percentage of satisfied customers also cited high cost (21%), significantly more than in 2013.

High cost was the top reason for dissatisfaction, confusion with billing was a distant second. Although it may not be possible to lower the cost of service, better communication around billing and reasons for the cost will likely help lift satisfaction levels in the future.



* Significantly higher than 2013 scores

** Significantly lower than 2013 scores

Overall Company and Services

When evaluating the company, customers were most satisfied with Liberty providing reliable and safe electric services. However, there was a significant decrease in satisfaction ratings for almost all attributes, comparing 2014 to 2013 results. Customers were least satisfied with price and company website, ranking them last.

Respondents were asked how satisfied they were with Liberty Utilities as a company. Customers ranked the quality of services at the top of the list (66%). Protecting employee/public safety (63%) and being environmentally responsible (58%) also scored high in terms of satisfaction. However, the majority of attributes were only given a satisfaction rating of less than 50%. This fact underlines and helps explain the low overall satisfaction rating.

Company Evaluation Key Indicators

- 84% Providing reliable electric services
- 83%** Providing safe electric services
- 67%** Accuracy of bill/statement
- 64%** Payment options
- 59%** Customer service
- 55%** Encouraging electric conservation
- 51%** Communications
- 44%** Community presence
- 37%** Company website
- 31%** Price

Satisfaction with Company

- 66% Quality of services
- 63% Protecting employee/public safety
- 58% Environmentally responsible
- 50% Responsible corporate citizen
- 48% Being a well-run company
- 48% Being open about how it operates
- 47% Commitment to the community
- 42% Providing good value for the price
- 42% Vision for the future

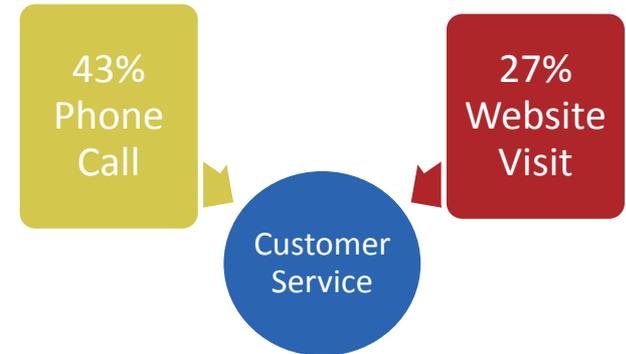
* Significantly higher than 2013 scores

** Significantly lower than 2013 scores

Customer Service

Almost half of all customers called Liberty in the past year (43%).

- The number of customers who called Liberty Utilities was significantly less in 2014, however, it remained the most used method of contact.
- Customers who called spoke to a live person 2.91 times on average and interacted with IVR 2.84 times on average in the past year.
- Just over a quarter of respondents used the website to contact customer service, and did so an average of 6.33 times in the past year.
- Customers results showed they were more satisfied with in-person experiences versus automated or online systems.



Satisfaction with customer service was lower - driven by time spent with representatives and unresolved requests.



- Overall satisfaction with customer service decreased 10% in 2014, with 62% of customers reporting that their experience with customer service was good/excellent, down from 72% in 2013.
- Satisfaction scores were stable for all metrics except one – satisfied with resolution significantly decreased to 64%, down from 74% in 2013.

Customer Billing

Satisfaction scores for customer billing have declined significantly – for every metric tested – over the last year.

- Overall, customers reported being most satisfied with their bill being easy to read (70%), easy to understand (68%) and payment options (65%-68%).
- Satisfaction surrounding the provision of useful rate information was the lowest scoring attribute (49%).

Lowest Satisfaction

- 49%** Useful information on rates provided

Moderate Satisfaction

- 63%** Bill accuracy
- 65%** Payment options easy to use

Strongest Satisfaction

- 70%** Bill easy to read
- 68%** Adequate payment options
- 68%** Bill easy to understand

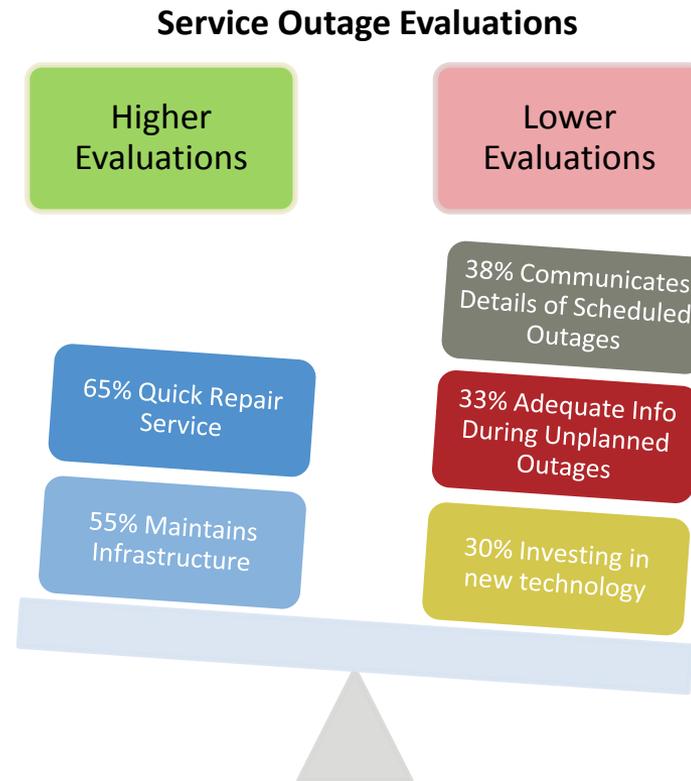
* Significantly higher than 2013 scores

** Significantly lower than 2013 scores

Service Outage

Liberty NH electric customers had lower satisfaction scores relating to Liberty's service outage efforts – but still a significant improvement from the first year of the study.

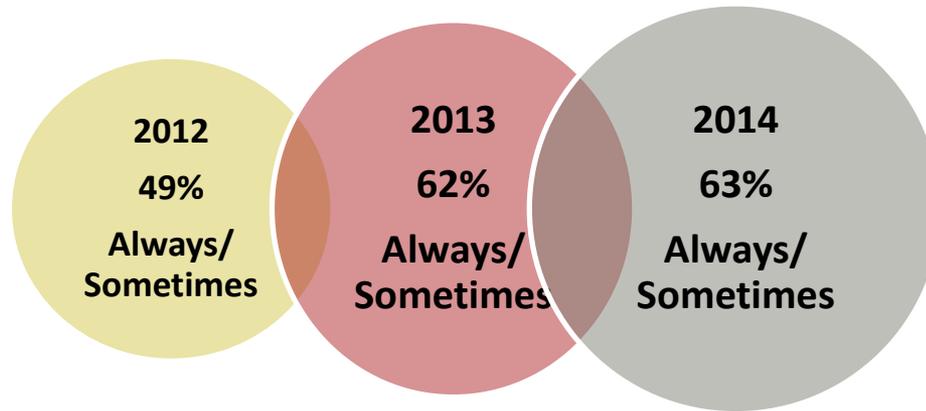
- Half of customers reported a service outage in 2014 (49%). Out of those reporting an outage, customers were most satisfied with Liberty making quick repairs to restore service (65%). However, communicating details of scheduled and unplanned service outages, and investment in new technology for uninterrupted power had very low ratings (30%-38%). There is large opportunity for raising satisfaction levels, simply by elevating the efforts to communicate outages and new technologies to customers.



Communication

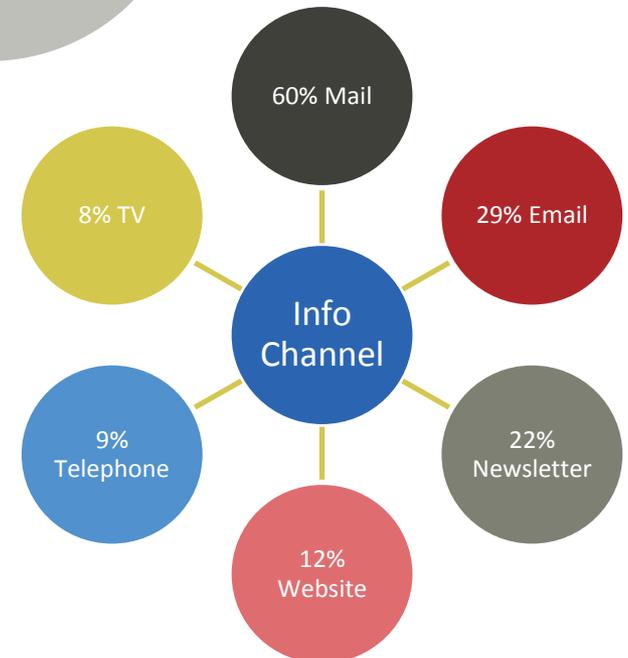
Bill insert readership has not changed in the past year.

- In 2014, customers reporting reading bill inserts was on par with 2013 (63% always/sometimes, compared to 62%). That said, there was a significant jump in customers who prefer communication via regular mail in 2014 (60%, vs. 54% in 2013).



The top preferred method of receiving information was regular mail/letter, followed closely by email.

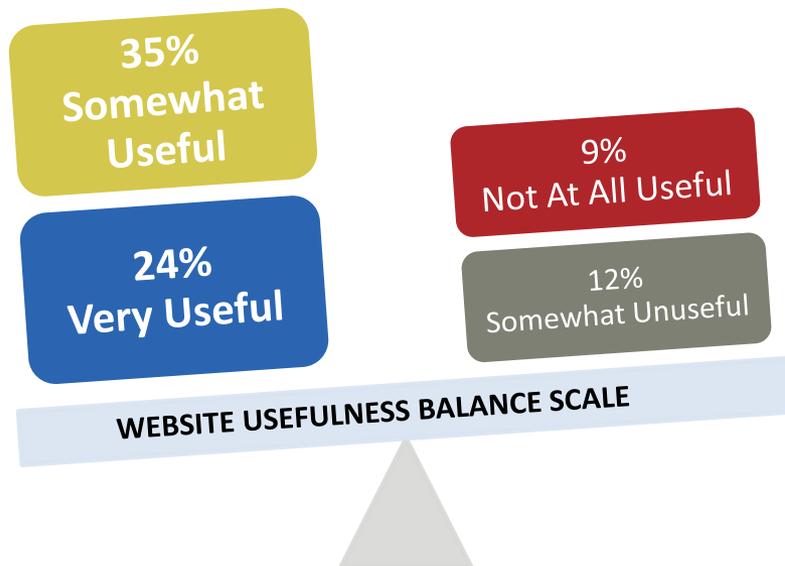
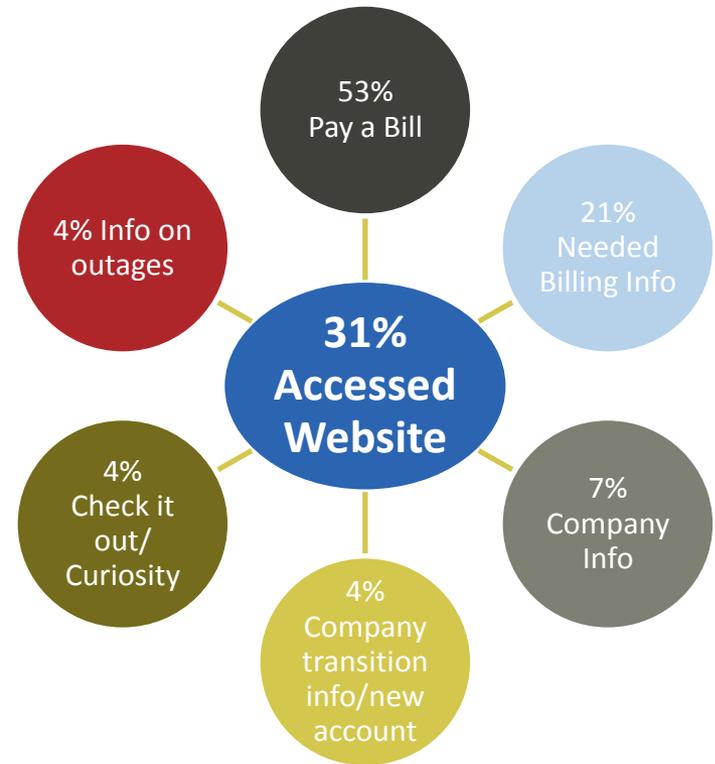
- NH Electric customers would like to see rate information, energy/cost savings tips, and energy alternatives in future communications.
 - Older customers (45+) were more likely to show interest in receiving several different types of information.



Communication - Website

Liberty Utilities website usage was on par with 2013, but perceived usefulness of the site has been declining since 2012.

- Customers primarily visited the website to pay a bill (53%) and for billing information (21%).
- NH Electric customers rated the overall usefulness of the website at 59%. However, the overall usefulness of the website has declined steadily since 2012. Updating the website, making it more user-friendly, enabling easy-to-use and understand bill-pay options is crucial, and will ultimately have an impact on overall satisfaction.



Recommendations

Overall Company

- Overall, satisfaction has declined significantly over the past several years. Understanding the root of dissatisfaction is crucial to the success of Liberty Utilities in the future. In turn, understanding customer segments' views will help shed light to reasons for satisfaction or dissatisfaction. Customers from the older segment (65+) consistently had a higher level of satisfaction throughout the study. While it is important to continue to reach these segments, targeting their counterparts will be necessary to increase overall satisfaction.
- Price was a key factor in customer dissatisfaction; price and providing a good value for the price received the lowest ratings among the various company evaluation aspects. In fact, not only does satisfaction go up when price is not taken into account, but both unsatisfied and satisfied customers indicated cost as a stumbling block to their overall satisfaction. It is recommended that Liberty Utilities continue ongoing public relations campaigns to increase customer understanding and acceptance of rates and any rate changes.
- Overall the satisfaction surrounding the website has declined drastically over the past two years. Website was one of the lowest ranked key satisfaction indicators, but customers reported its usefulness to be waning greatly in 2014. It is recommended to invest time and money into a streamlined website. This will help target the younger segments with lower overall satisfaction scores.

Recommendations

Customer Service

- Satisfaction with customer service has fallen ten percent since 2013. In fact, all metrics tested declined, with the exception of customer service being easy to understand. Satisfaction was higher when talking to a person rather than utilizing IVR or even the website.
- NH Electric customers agreed that customer service was easy to understand, courteous/respectful, and knowledgeable. These are all key qualities when working with customers, and efforts to maintain or excel here should be made. However, customers were least likely to agree that they had a reasonable waiting time, or that they were satisfied with the resolution. Investigation should be applied here to understand factors leading to this dissatisfaction. Finally, to alleviate waiting times, consider adding staff to man the phones during key hours of the day, or seasons of the year.

Customer Billing

- Overall, satisfaction with billing has declined across all metrics measured. One metric – provides useful info about how rates are determined – was agreed upon by less than half of respondents. Liberty Utilities would benefit from an effort to communicate rate information consistently, clearly and in a way that the average customer can understand.

Recommendations

Service Outages

- Almost half of customers had reported an electric outage in 2014. The good news is that Liberty Utilities received above average scores in repairing those outages quickly. However, customers have Liberty Electric very low scores for communicating planned and unplanned outages, and investment in new technology for uninterrupted power. Investing in more communications – targeted for different segments – may help increase overall satisfaction during power outages.

Communication

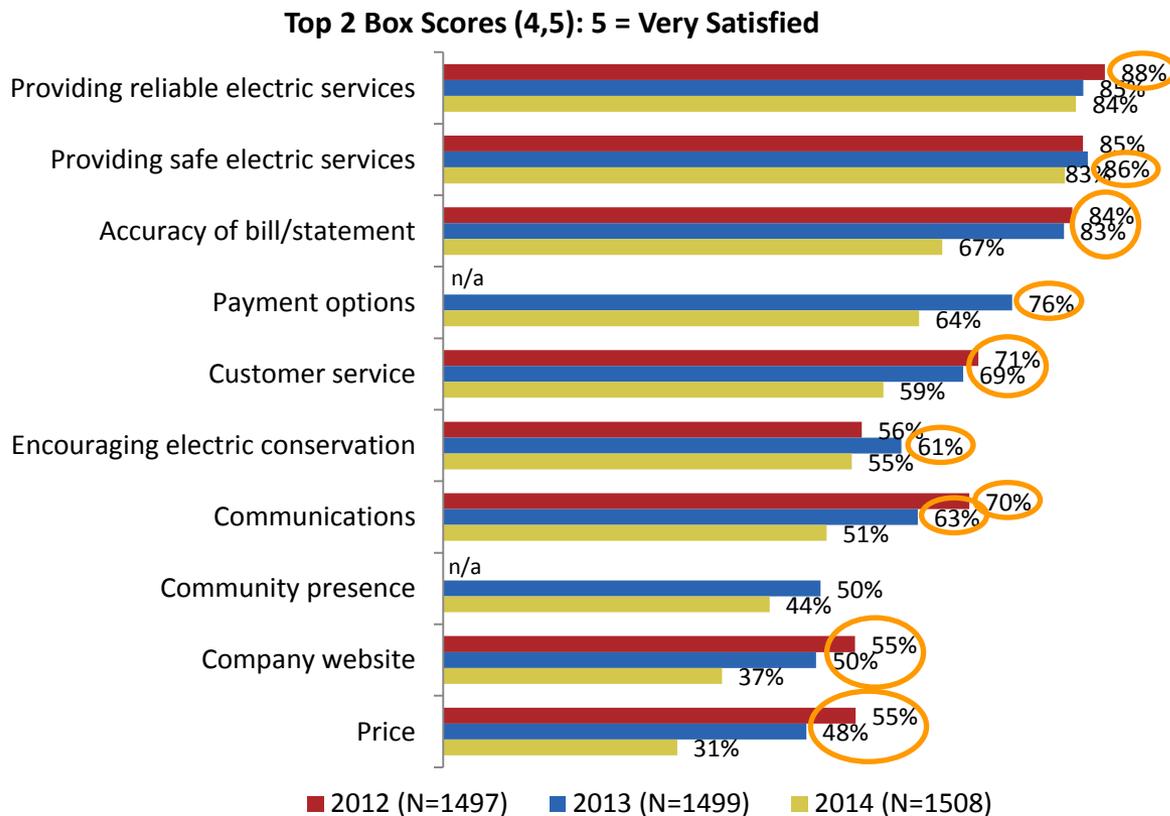
- Bill insert readership remained steady from 2013 rates for NH electric customers. Bill insert readership was particularly high among older customers. This segment also prefers regular mail for communication methods. Younger customers preferred to be communicated with electronically. Consistent with the entire report, customers prefer to receive information on rates, as well as energy/cost savings tips.
- Recommendations throughout this study are based upon communication efforts. Utilizing targeted, ongoing efforts to communicate rates, information surrounding community presence, service outages, and new technologies (including website capabilities and updates), will be a driving factor of ongoing customer satisfaction.

DETAILED FINDINGS

OVERALL SERVICES AND COMPANY

Company Evaluation – Satisfaction

Generally, satisfaction scores showed a decline in the company’s overall performance – there were no attributes where an increase in satisfaction was observed. Areas with the largest decreases included price (-17%), accuracy of bill/statement (-16%), company website (-13%), payment options (-12%), and communications (-12%).



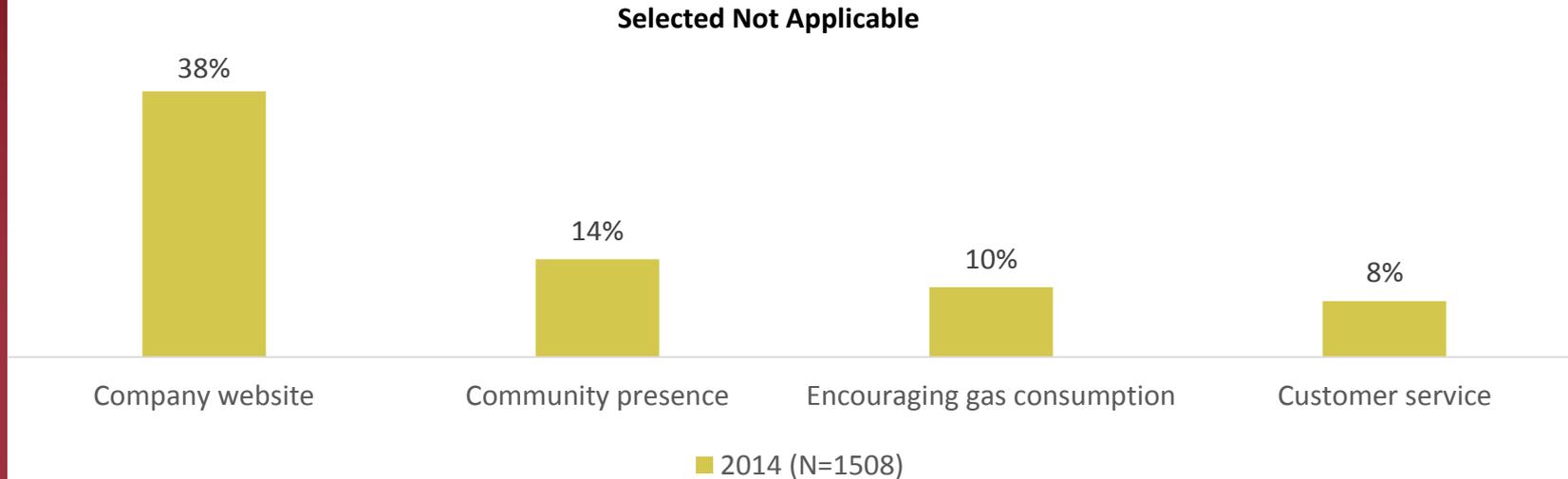
NOTE: Orange circled data indicates significant differences between the two years.

NOTE: N/A option offered for all statements in 2013; N/A option offered for 4 of 10 statements in 2014. Less than n=20 respondents selected N/A for 5 of 6 statements in 2013 where N/A was not offered in 2014, so all 2013 scores were shown with N/A excluded from the base. Where applicable, all 2014 scores were also shown with N/A excluded from the base.

Q2. Please rate Liberty Utilities in the following areas by using a 5-point scale with 5 being “Very Satisfied” and 1 being “Very Dissatisfied”.

Reasons for Selecting Not Applicable

For the company evaluation metrics, customers chose Not Applicable because they had not used the service or feature being asked about.



Reasons Why

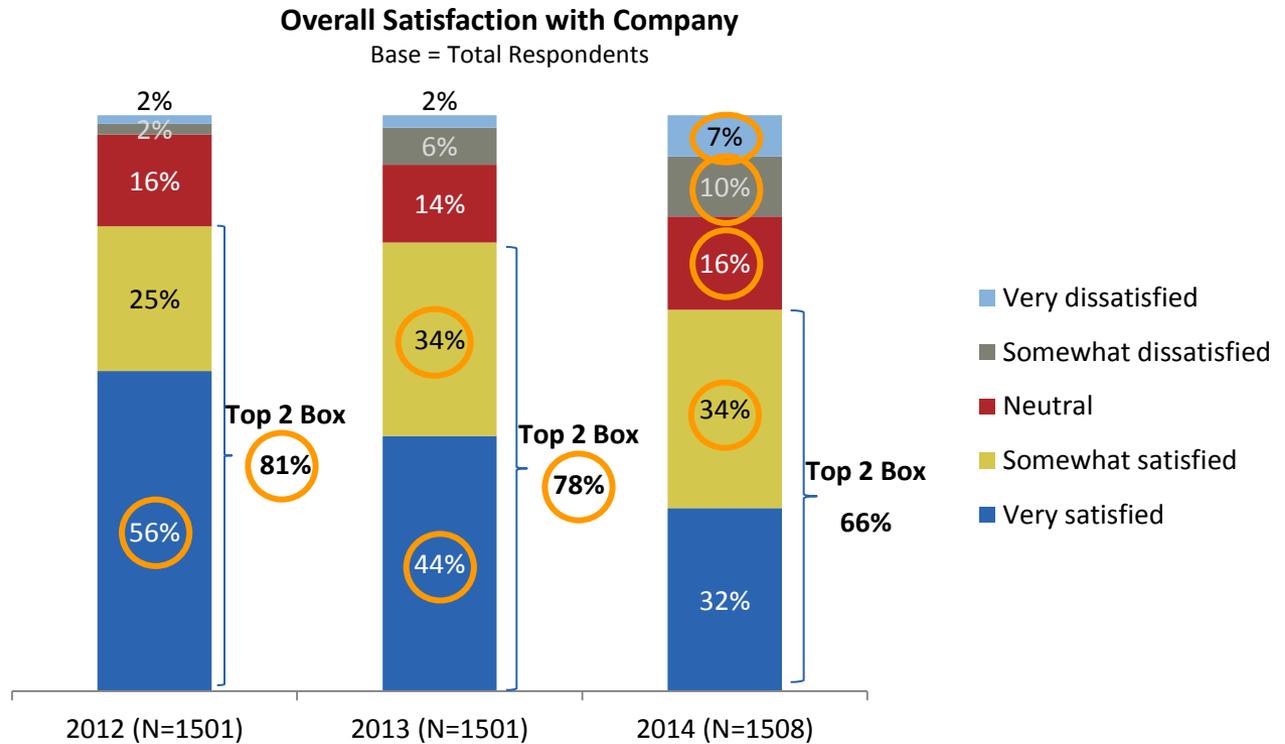
N=570	2014 Total (5%+ Mentions)	N=211	2014 Total (5%+ Mentions)	N=153	2014 Total (5%+ Mentions)	N=119	2014 Total (5%+ Mentions)
Haven't used this	66%	Have not used this	50%	Haven't used this	50%	Haven't used this	51%
No computer	14%	Don't know	28%	Don't know	36%	No reason to contact	24%
Don't know	9%	Don't see them in community	11%	Have not heard anything about this	9%	Don't know	13%
NA/Nothing/No comment	8%	NA/Nothing	8%	NA/Nothing/No comment	7%	NA/Nothing	13%
		No reason to contact	7%			No computer	5%
						Don't see them in community	5%

Q2b. Why did you say that the following aspects of Liberty Utilities' services are not applicable to you? Please be as specific as possible.

Overall Satisfaction

There was a decrease in overall satisfaction with Liberty Utilities among electric customers. Most notable was the shift in very satisfied customers, which decreased from 44% in 2013 to 32% in 2014.

Customers ages 65+ were most likely to say they were satisfied, while customers ages 18-44 were more likely to express dissatisfaction – an area worth exploring.



NOTE: Orange circled data indicates significant increases between years.

Q3. Overall, how satisfied are you with Liberty Utilities?

Reasons for Satisfaction/Dissatisfaction

Never having a complaint remained the top reason customers said they were satisfied (31%). However on in five satisfied customers still indicated high costs as an area of concern. Significantly less customers indicated their service was reliable/no service interruptions (10%, down from 17%).

The top reason for dissatisfaction was high cost/rate increases, cited by two-thirds dissatisfied customers (67%), a significant increase from 2012 and 2013. Additionally, a significant number of customers said problematic billing (17%) was a reason for dissatisfaction.

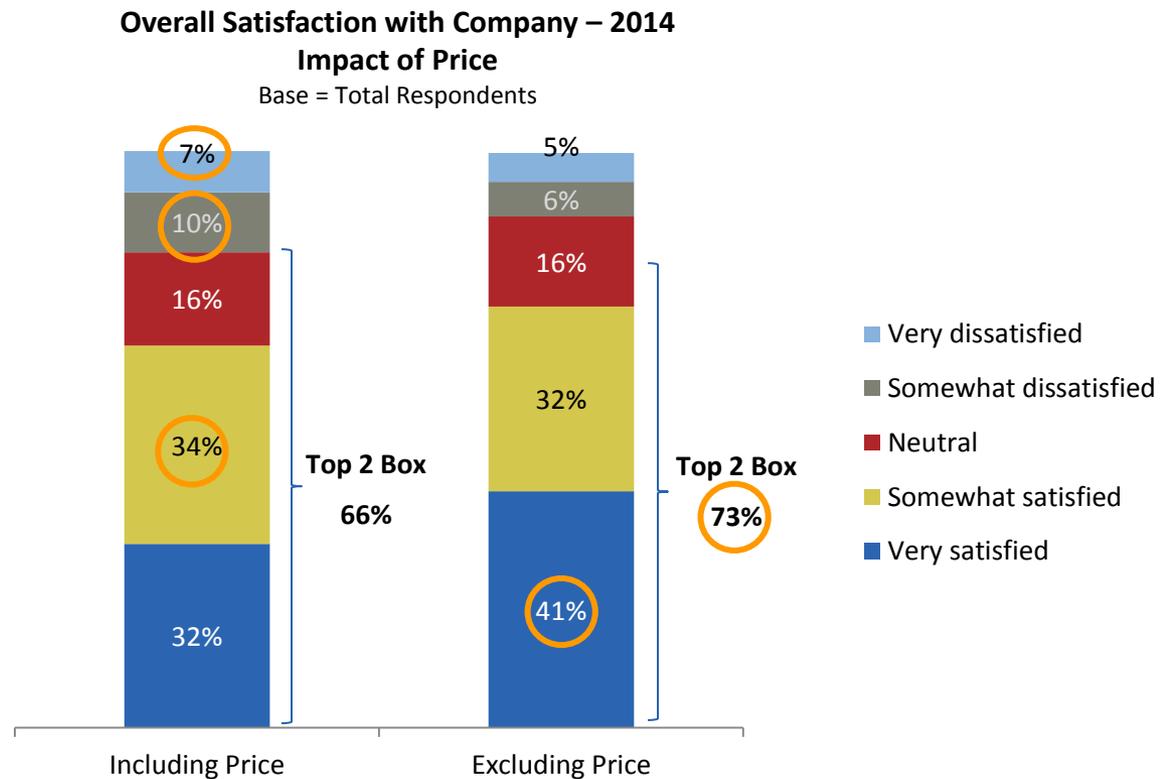
Suggestions for Improvements	2012 Total	2013 Total	2014 Total	Difference from 2013
Why Satisfied	N=1211	N=1169	N=999	
Never had a problem/complaint	47%	23%	31%	8%
Cost is too high/rate increases	4%	12%	21%	9%
Reliable/Receive services paid for/No service interruptions	12%	17%	10%	-7%
Prompt, considerate repair service	3%	12%	7%	-5%
Service is satisfactory/good/excellent	4%	9%	6%	-3%
Why Dissatisfied	N=51	N=129	N=129	
Cost is too high/rate increases	35%	49%	67%	18%
Billing is confusing/problematic	12%	7%	17%	10%
Poor communication/response/unable to contact*	12%	13%	12%	-1%
Poor/unfriendly/uncaring customer service	20%	16%	8%	-8%
Website not user-friendly/informative	-	4%	8%	4%
Insufficient online services/payment options	6%	14%	7%	-7%
Service interruptions*	24%	22%	6%	-16%

NOTE: Bold red data indicates significant increases between years. Data is only shown for 5%+ mentions in 2014.

NOTE: Service interruptions was coded as "not reliable" in 2012; "poor communication" was coded as "poor community relations/communication/PR" in 2012 Q3B. Being as specific as possible, why did you say you are [INSERT FROM Q3] with Liberty Utilities?

Overall Satisfaction Excluding Price

Customers were more likely to report higher satisfaction scores when asked to consider Liberty’s services excluding price. Those who reported being very satisfied increased from 32% to 41%, indicating that price played a role in the satisfaction levels among NH electric customers.

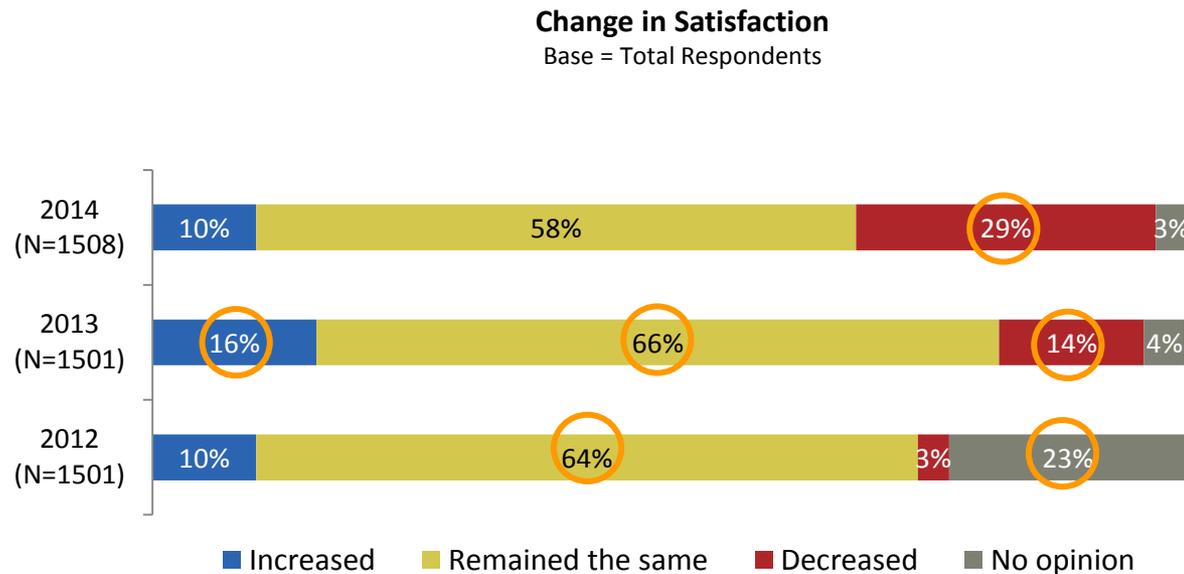


NOTE: Orange circled data indicates significant increases between the two groups.

QEAST01. Using a scale where 5 is "very satisfied" and 1 is "very dissatisfied", how satisfied are you with the services, excluding price, that you are receiving from Liberty Utilities?

Overall Change in Satisfaction

Over half of New Hampshire electric customers (58%) said that their overall satisfaction with Liberty Utilities remained the same over the past year. Only 10% of customers reported an increase in satisfaction. There was a significant increase in customers reporting that their level of satisfaction decreased (29%, vs. 14% in 2013).



NOTE: Orange circled data indicates significant increases between years.

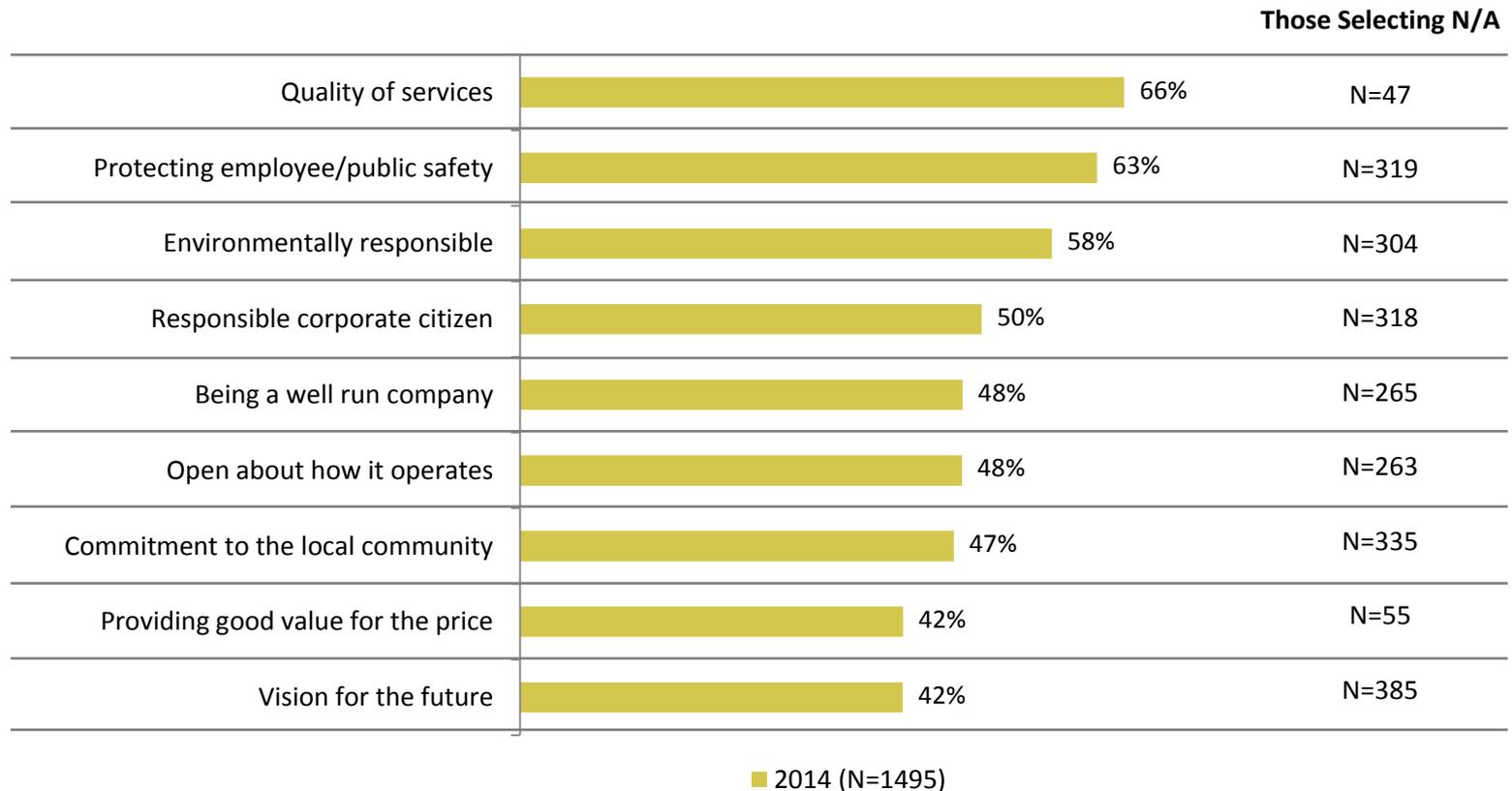
Q4. Would you say that your overall satisfaction with Liberty Utilities has increased or decreased over the past year?

Company Evaluation – Key Indicators

Liberty customers were most satisfied with the quality of services provided (66%).

Conversely, providing good value for the price and vision for the future were ranked last, as less than half of gas customers felt Liberty performed well in these areas (42% each).

Top 2 Box Scores (4,5): 5 = Excellent

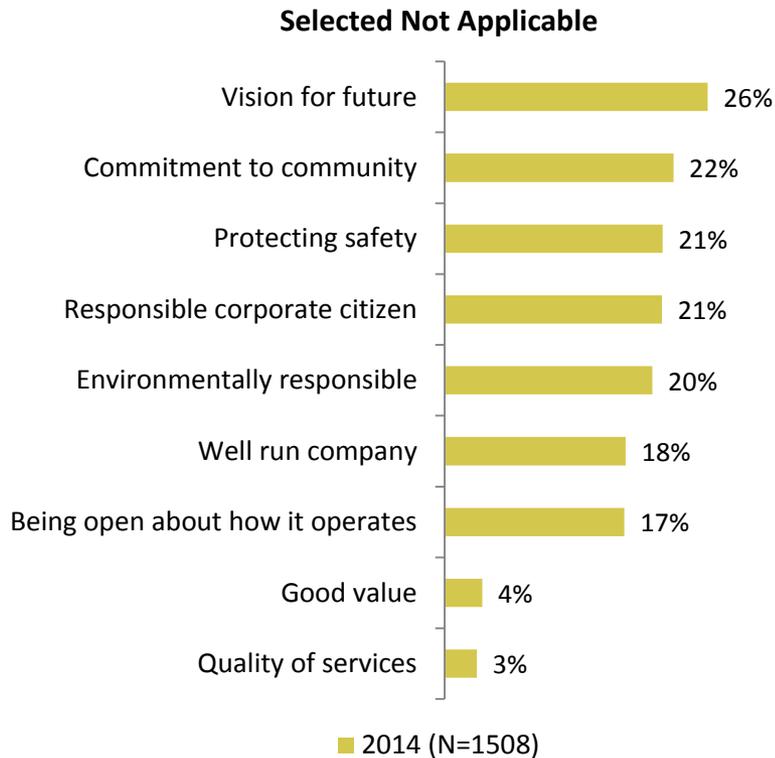


NOTE: N/A option offered for no statements in 2013; N/A option offered for all statements in 2014. Only 2014 scores shown, with N/A excluded from the base. Q5. Based on a scale from 1 to 5 where 1 is "Poor" and 5 is "Excellent", please rate how good a job Liberty Utilities does on each of the following items:

Reasons for Selecting Not Applicable

Customers were more likely to select Not Applicable for metrics related to the company’s positioning and perceptions (vision for the future, commitment to the community) than for those related to more tangible value and services (good value, quality of services).

When Not Applicable was selected, it was mostly because customers were not sure what was meant.



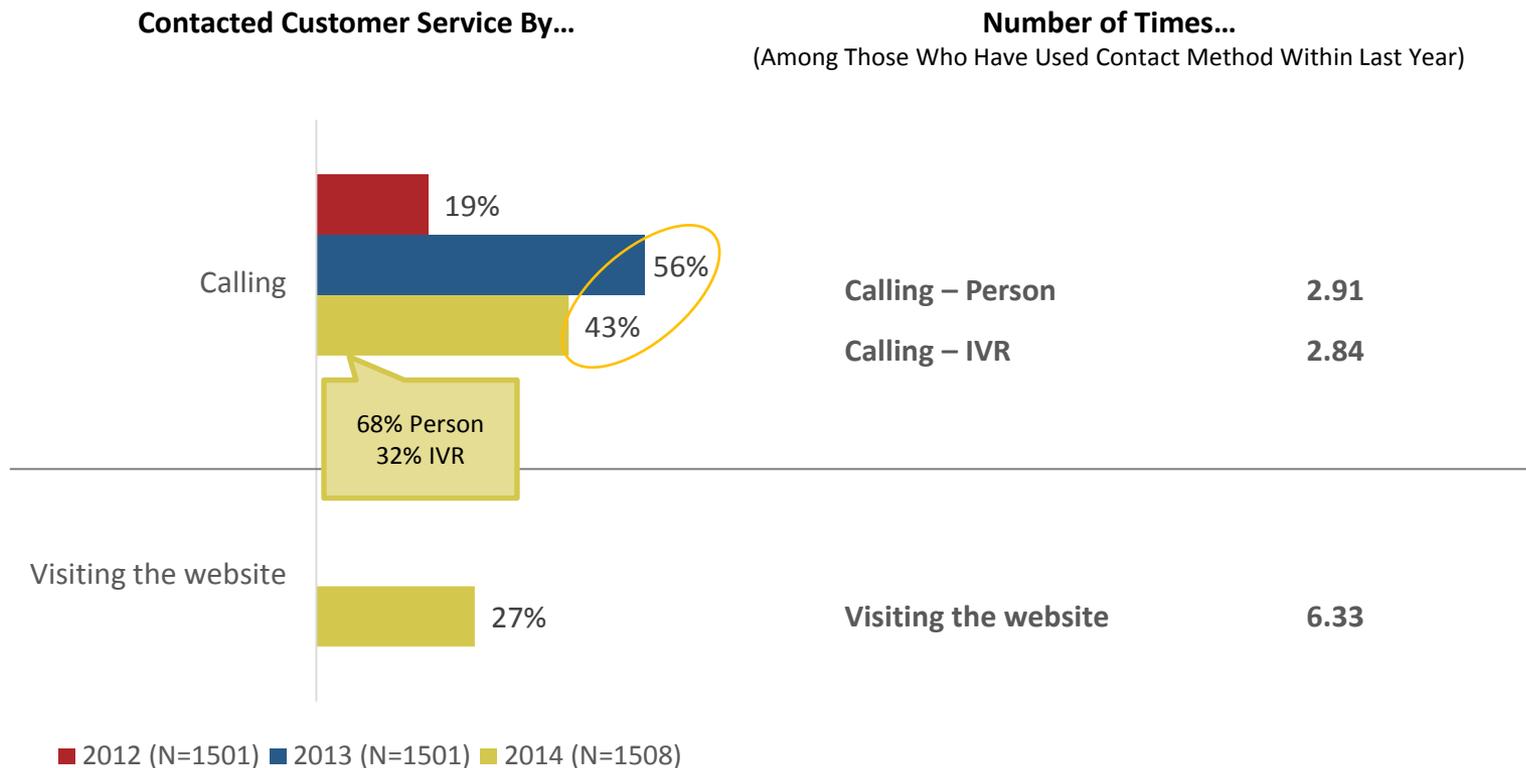
N=587 (Respondents who Selected N/A for 1+ Statements)	2014 Total (5%+ Mentions)
Not sure what is meant by this	60%
Have no experience in this area	20%
NA/Nothing/No comment	12%

CUSTOMER SERVICE

Customer Service

In 2014, customers most frequently contacted customer service by calling (43%). Those calling spoke to a person an average of 2.91 times, and utilized IVR 2.84 times over the past year.

One in four customers visited the website for customer service (27%). Customers visiting the website did so an average of 6.33 times within the last year.



NOTE: Orange circled data indicates significant increases between the year(s).

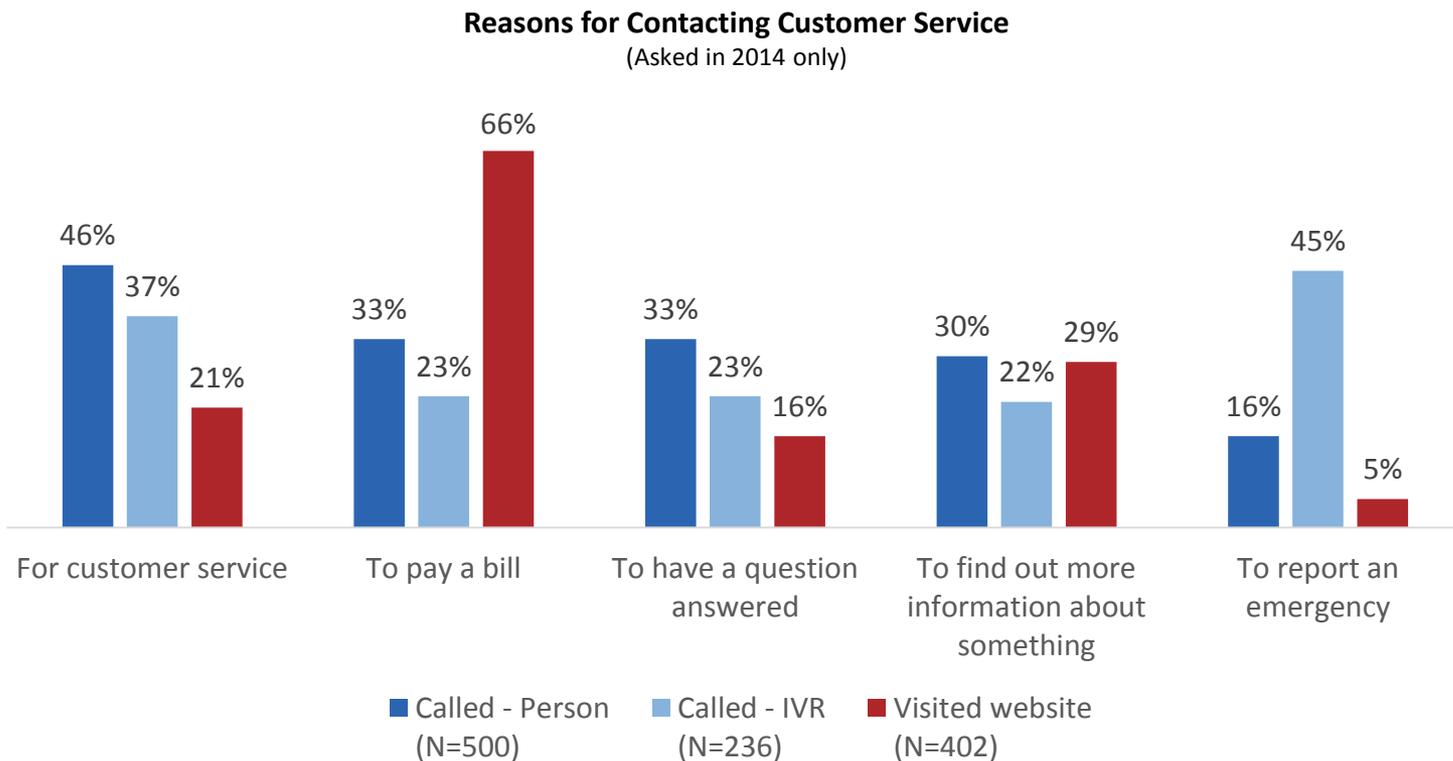
Q6z. Which of the following have you done in the past year? Please select all that apply.

Q6x. When you called Liberty Utilities in the past year, did you...?

Q6A. To the best of your recollection, how many times have you done each of the following within the last year?

Reasons for Contacting Customer Service

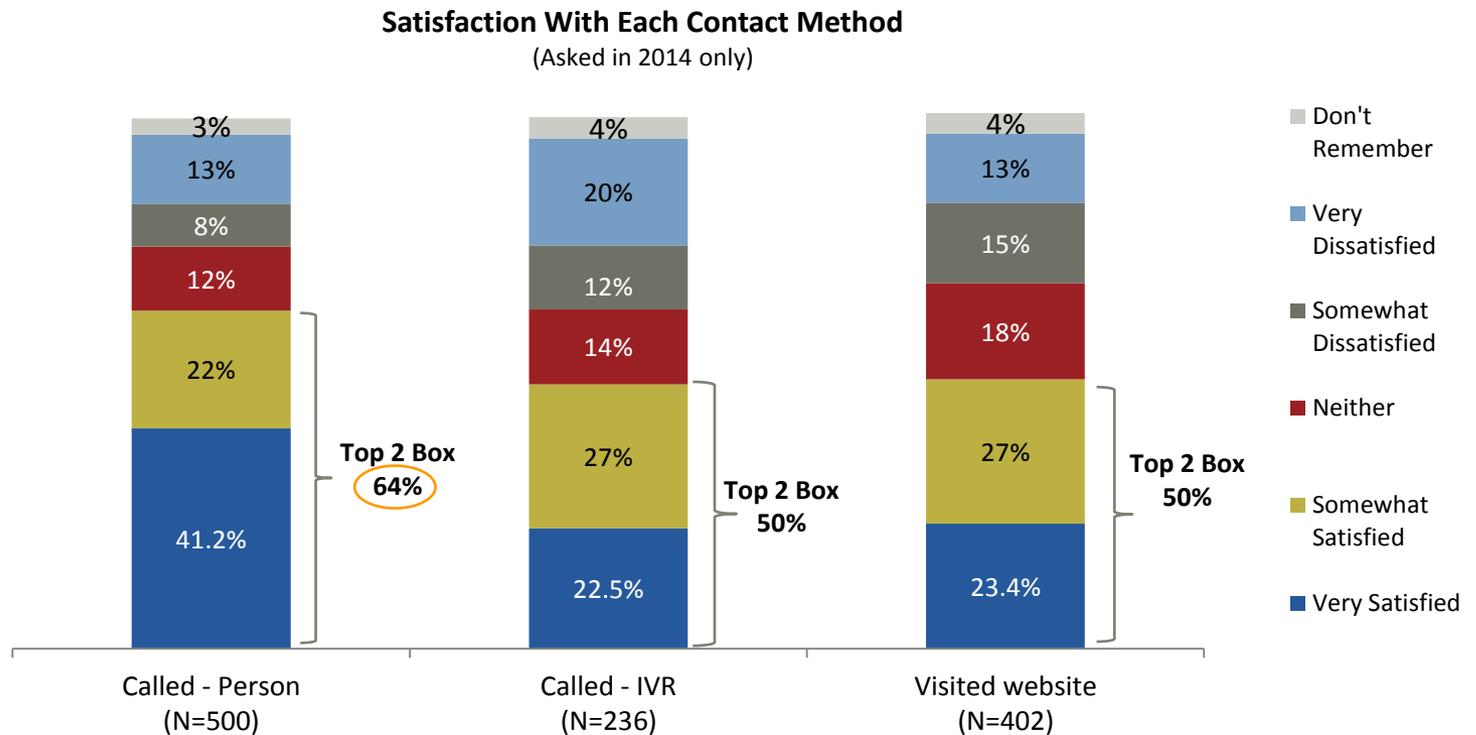
In general, the most common reason for contacting customer service was related to paying a bill. This was particularly relevant for those who visited the website, whereas for those calling, customer service related issues played a bigger role. Customers primarily used the IVR system to report an emergency.



Q6w. Which of the following best describe your reason(s) for contacting Liberty Utilities in the past year? Please select all that apply.

Customer Service – Overall Experience with Contact Method

Satisfaction with the customer service experience was significantly higher among those who spoke to a person on the phone – 64% customers with personal contact were satisfied, compared to 50% of customers who used IVR and those who visited the website. One in five customers call called and interacted with IVR gave a very dissatisfied rating for their experience with this contact method.

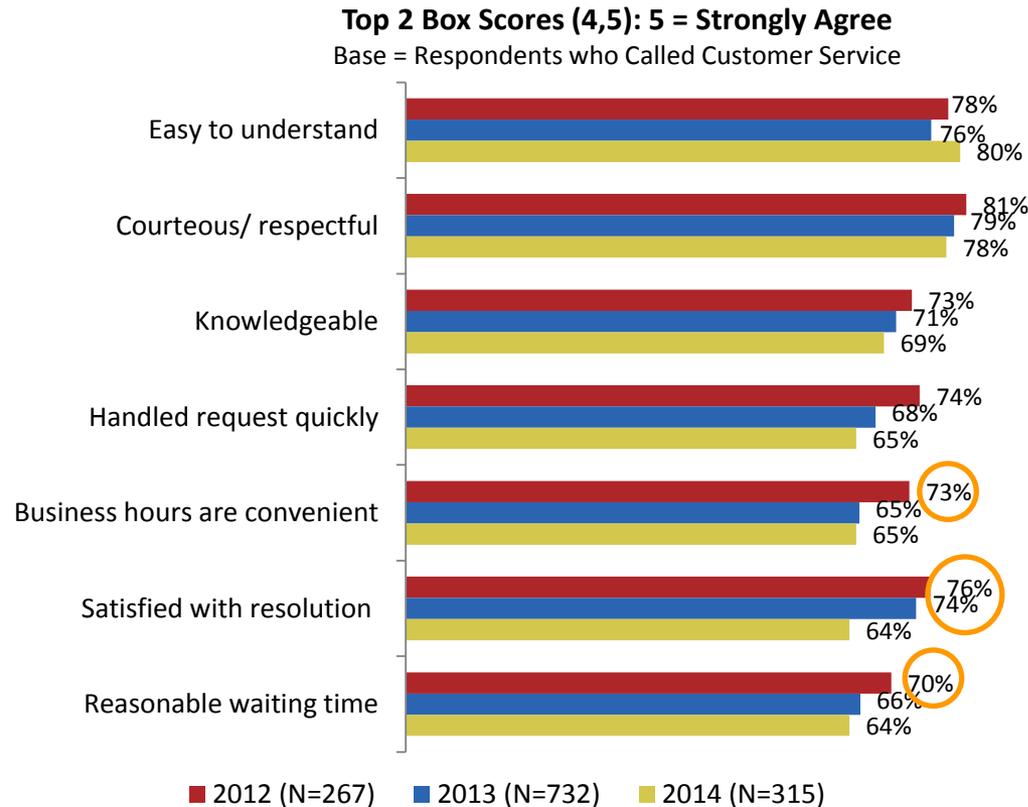


NOTE: Orange circled data indicates significant differences compared to other subgroup(s).

Q6y. Overall, how satisfied are you with your experience with each of the following?

Customer Service – Satisfaction

Eight out of ten customers felt that the customer service staff was easy to understand (80%), the highest rated attribute for customer service. Overall, satisfaction scores were stable for all metrics except one – satisfied with resolution significantly decreased to 64%, down from 74% in 2013.



NOTE: Orange circled data indicates significant increases between years.

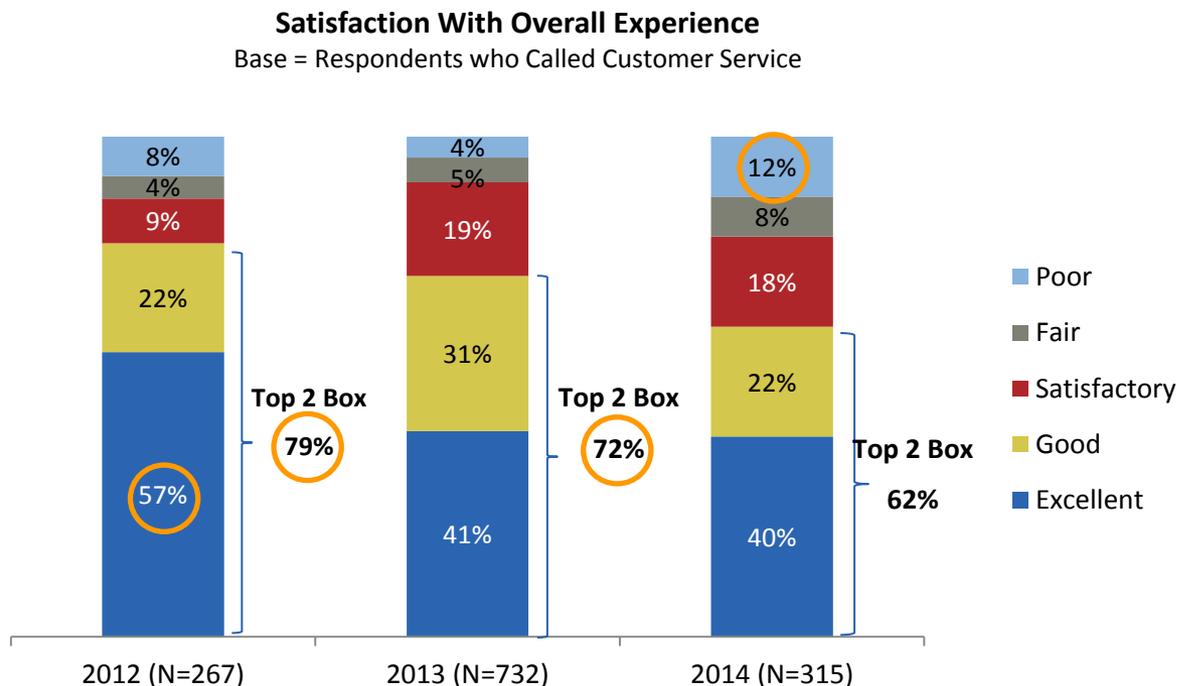
NOTE: In 2013, respondents were asked this question if they contacted Liberty Utilities within the past year. In 2014, respondents were asked this question if they contacted Liberty Utilities for customer service within the past year.

Q7. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements about Liberty Utilities' customer service. If you have called more than once within the last year, please think only about your last contact with Liberty Utilities.

Customer Services – Overall Experience

Close to two-thirds of customers said they were satisfied with their customer service experience in 2014 (62%), a significant decrease from the previous year (72%).

There were more customers reporting their experience as poor in 2014 (12% vs. 4% in 2013).



NOTE: Orange circled data indicates significant increases between years.

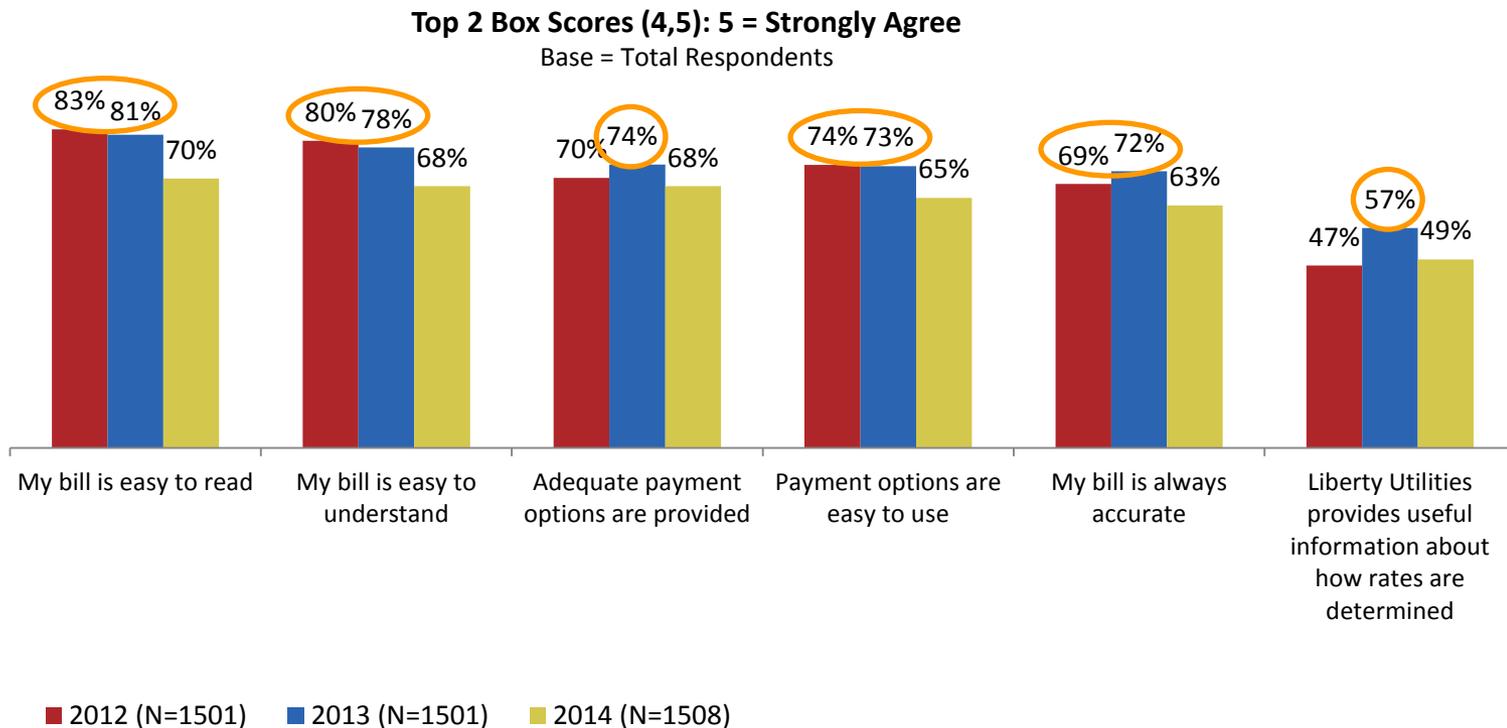
NOTE: In 2013, respondents were asked this question if they contacted Liberty Utilities within the past year. In 2014, respondents were asked this question if they contacted Liberty Utilities for customer service within the past year.

Q8. Overall, how would you rate your experience with the customer service you received? If you have called the office more than once in the last year, please think only about your last contact with Liberty Utilities.

CUSTOMER BILLING

Customer Billing – Satisfaction

Satisfaction with all aspects of customer billing decreased in 2014. The biggest decreases were seen for my bill is easy to read (-11%) and my bill is easy to understand (-10%).



NOTE: Orange circled data indicates significant increases between years.

Q9. Using a 5-point scale where 5 is Strongly Agree and 1 is Strongly Disagree, please tell me how much you agree or disagree with each of the following statements.

SERVICE OUTAGE

Service Outage

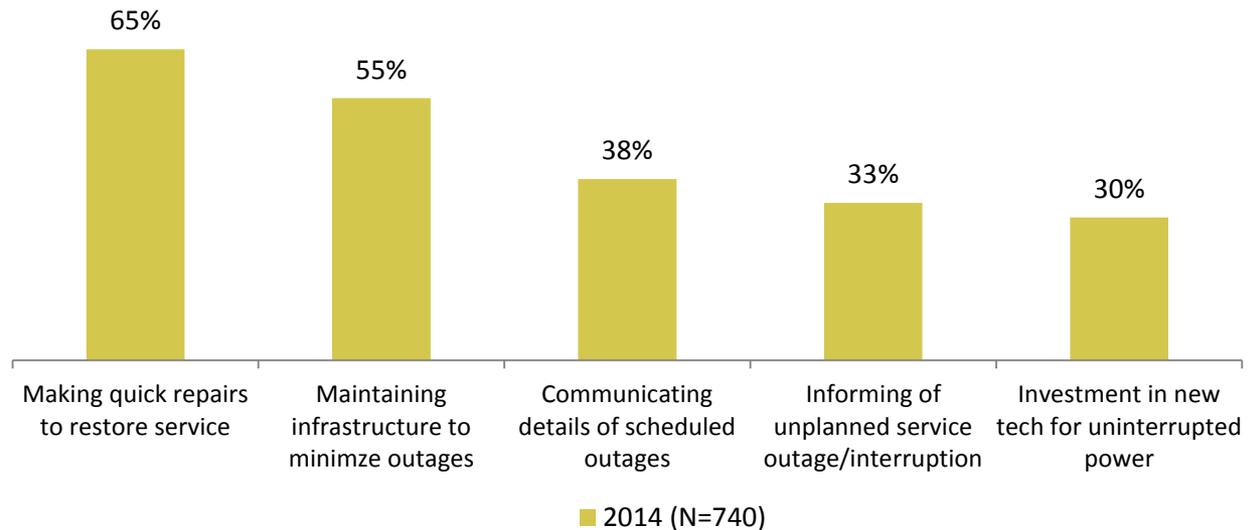
About half (49%) of all Liberty customers experienced a service outage in the past year.

Those who experienced an outage were most happy with Liberty's ability to make quick repairs (65%). Areas of improvement for Liberty include communication around scheduled and unplanned outages, as well as investments in new technology.

49% of customers had a service outage in 2014

Top 2 Box Scores (4,5): 5 = Excellent

Base = Experienced an Outage



Note: Statements based differently in 2013 and 2014; in 2013 all statements were asked of all respondents contacting customer service; in 2014, only those who had a service outage were asked statements.

NOTE: Orange circled data indicates significant differences between the two years.

Q10b. Have you experienced a service outage in the past year?

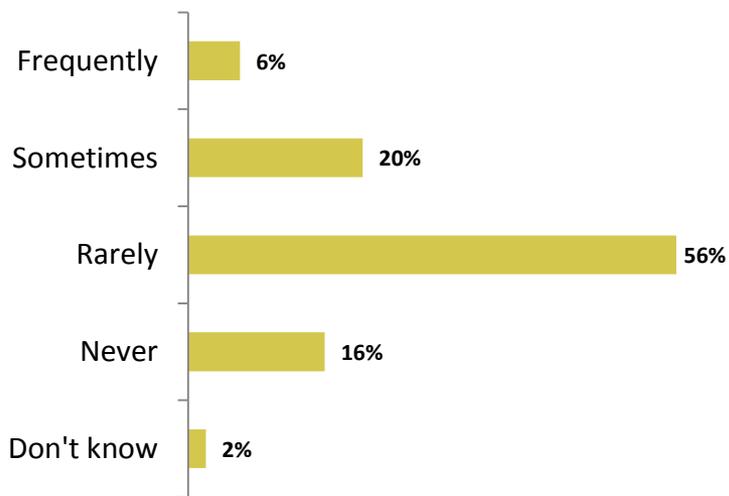
Q10. Thinking about all of your experiences with Liberty Utilities, please rate how good a job they do on each of these items on a scale from 1 to 5, where 1 is "Poor" and 5 is "Excellent".

Service Outage

Over half (56%) of Liberty customers had service outage on a rare occasion. Almost half of Liberty customers expected that the actual restoration time should be within 1-6 hours of the Liberty Utilities estimate (44%). One in three didn't know.

Frequency of Service Outages

Base: Total Respondents
N=1508

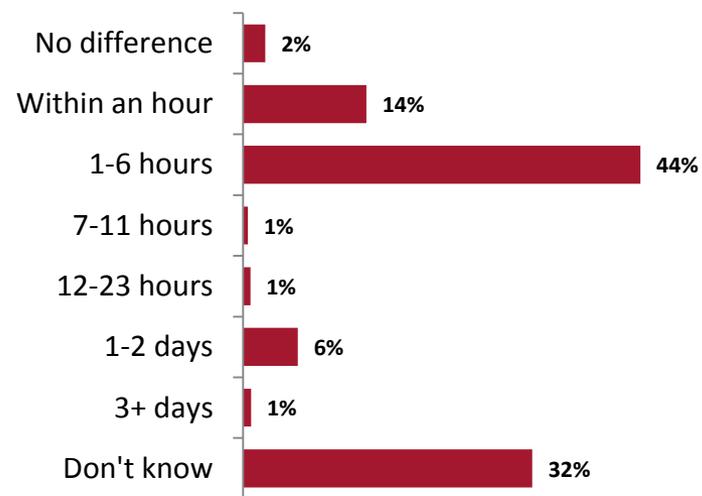


Acceptable # outages in 12 month span of time:

2.17

Expected Restoration Times in Service Outage

Base: Total Respondents
N=1508



NOTE: QEAST02 was not asked in 2011-2013.

QEAST02 Liberty Utilities understands that outage information is important to you. When contacting Liberty Utilities to obtain an estimated restoration time, how close do you expect the estimate from Liberty Utilities to be to the actual time of restoration?

QEAST03 Would you say that your power goes out...

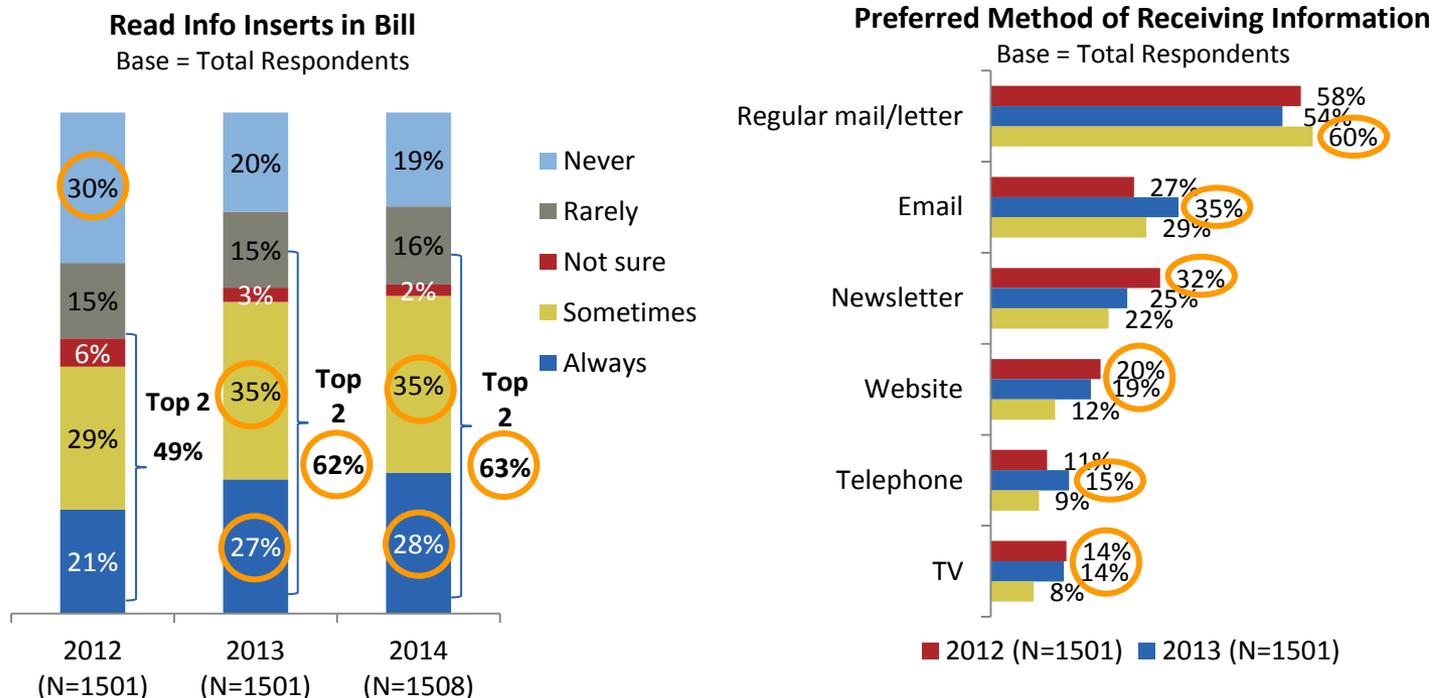
QEAST04 Recognizing that electric outages happen periodically, how many are acceptable over a 12-month period?

COMMUNICATION

Billing Inserts & Preferred Channels

Insert readership levels in 2014 were on par with 2013, with two-thirds of customers reporting they read their bill inserts sometimes or always. Customers ages 65+ were more likely to read the inserts than younger customers.

The top preferred method of communication among New Hampshire gas customers was regular mail/letter, favored by 60% of customers, a significant increase from 2013. Not surprisingly, older customers were significantly more likely to prefer regular mail, while younger customers preferred communications via email.



NOTE: Orange circled data indicates significant increase compared to other year(s).

Q11. Liberty Utilities inserts informational newsletters into their customers' monthly bill. How often do you read the informational inserts included in your bill?

Q12. How would you like to receive information from Liberty Utilities? Please select all that apply.

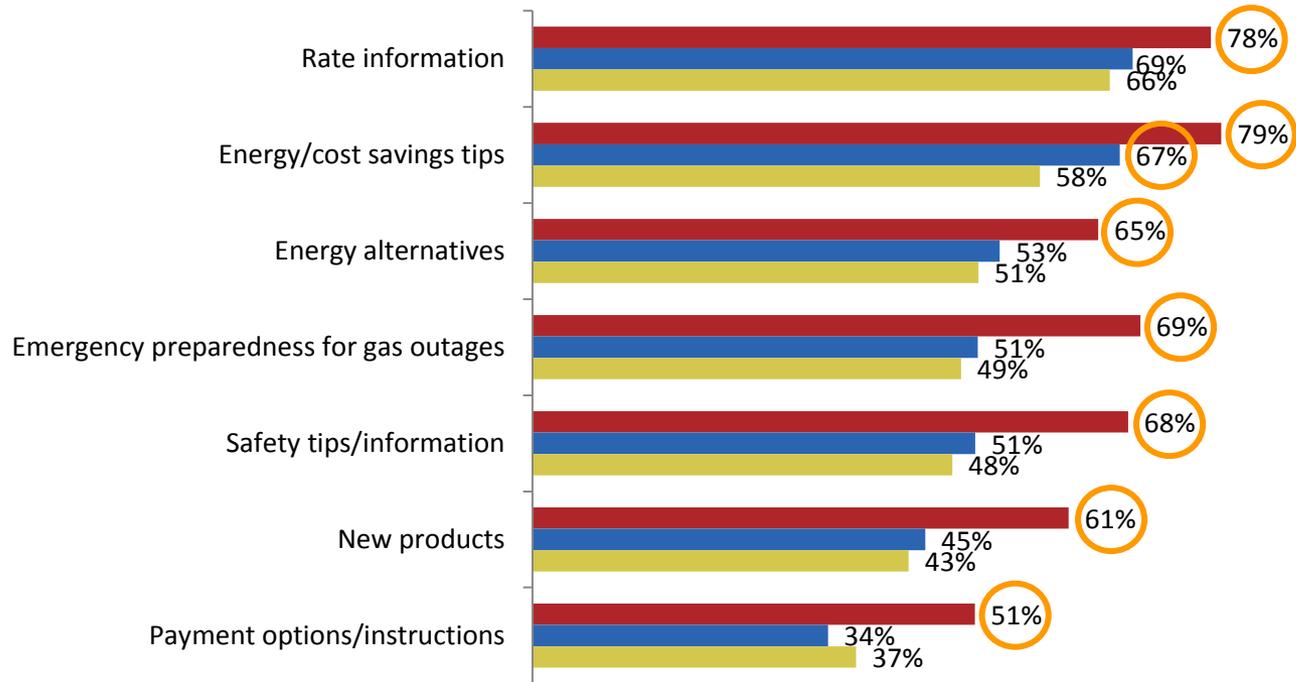
Preferred Types of Info

Interest in receiving almost all types of information were on par with 2013. Information on rates, energy/cost savings tips, and energy alternatives remained the priorities. All other types of information were of interest to less than half of customers.

Information Preferred in Future Communications

Base = Total Respondents

■ 2012 (N=1501) ■ 2013 (N=1501) ■ 2014 (N=1508)



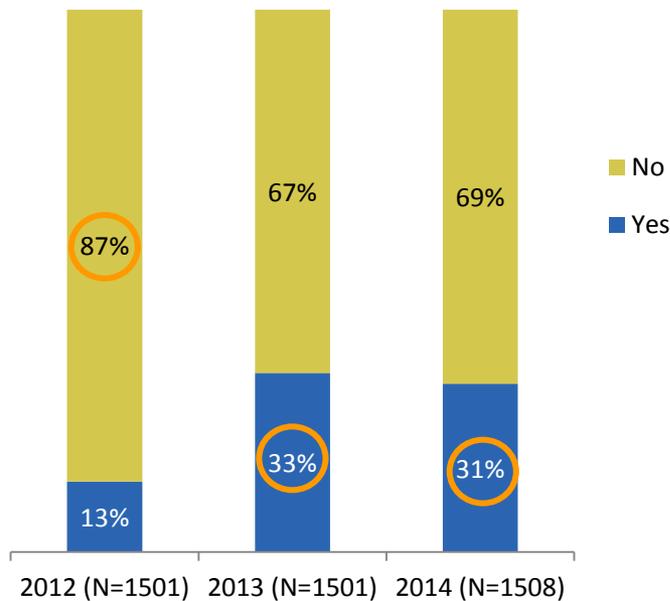
NOTE: Orange circled data indicates significant increases between years.

QEAST05. What types of information would you like Liberty Utilities to include in future communications? Please select all that apply.

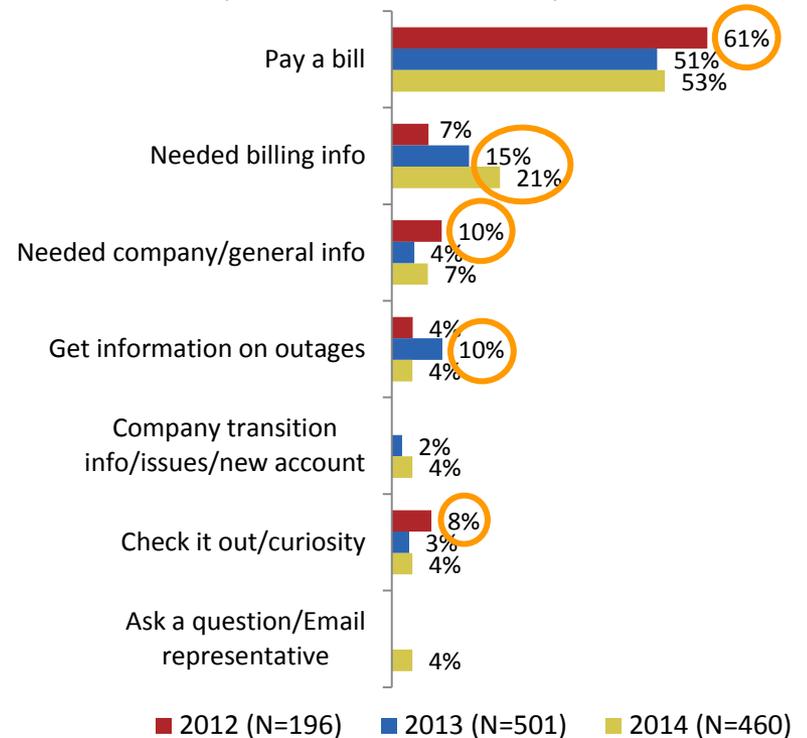
Website Access & Reasons for Visit

The number of customers who visited the utility's website remained on par with 2013 (31%), and over half of Liberty customers visit the website to pay a bill (53%) or because they need billing info (21%).

Accessed Website
Base = Total Respondents



Why Visit Website
Base = Respondents Who Visited Liberty Utilities' Website

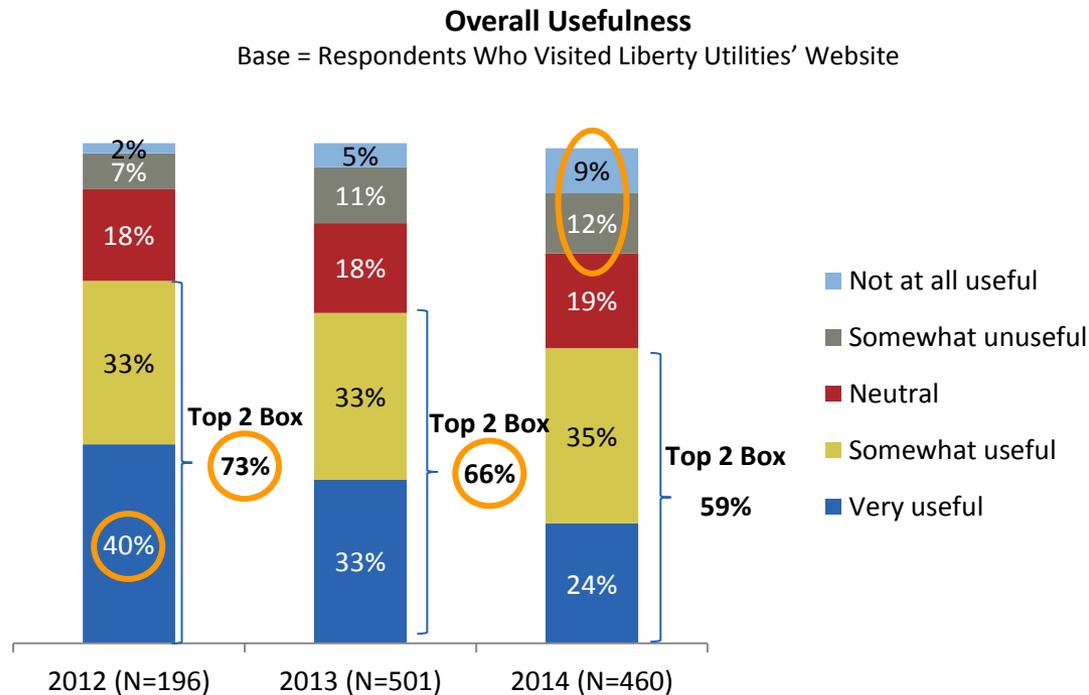


NOTE: Orange circled data indicates significant increases between years.; 5%+ mentions shown for Q14

Q13. Have you visited the Liberty Utilities website within the past year? / Q14. For what reasons did you visit the website?

Website Satisfaction

Satisfaction with the website decreased significantly; there was a noticeable decline in those who perceived the website as being very useful along with a corresponding increase in those who perceived the website to be not useful.



NOTE: Orange circled data indicates significant increases between years.

Q15. Please rate the usefulness of Liberty Utilities website using a scale from 1 to 5, where 1 is "not at all useful" and 5 is "very useful"..

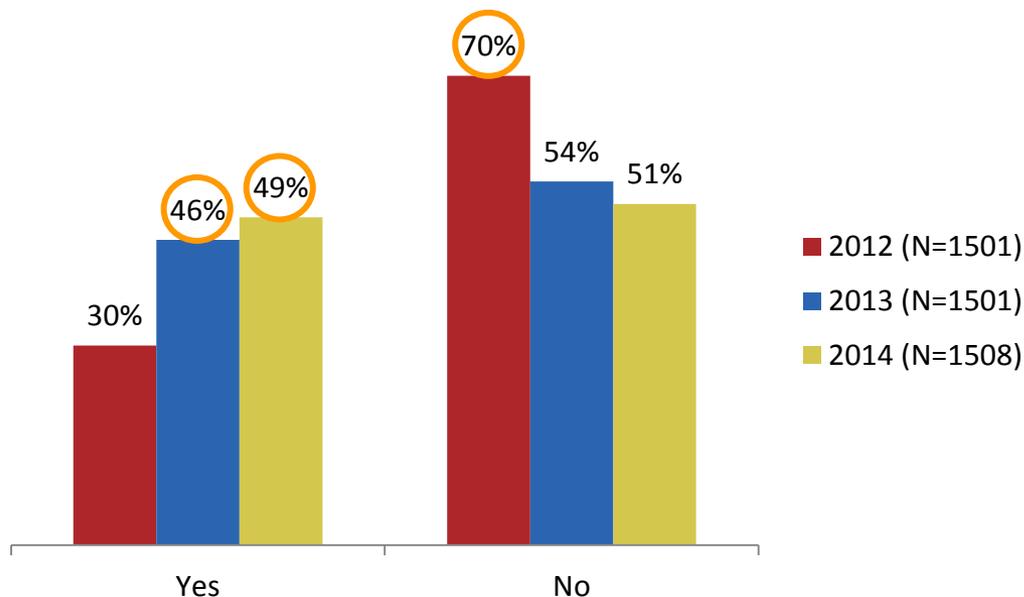
AWARENESS OF ENERGY EFFICIENCY PROGRAMS

Awareness of Energy Efficiency Programs

Awareness surrounding Liberty Utilities' energy efficiency programs continued to increase from 2013 to 2014, with almost half of customers stating they were aware of such programs (49%). Liberty has therefore been more effective in communicating these efforts to customers and should continue to promote such information.

Awareness of Energy Efficiency Programs

Base = Total Respondents



NOTE: Orange circled data indicates significant increases between years.

QEAST06. Are you aware that Liberty Utilities offers energy efficiency programs to help you reduce your energy costs?

RESPONDENT PROFILE

Respondent Profile

	2012	2013	2014
Total	N=1501	N=1501	N=1508
Gender			
Male	45%	42%	45%
Female	55%	58%	55%
Age			
18 to 24 years	3%	2%	1%
25 to 34 years	10%	9%	11%
35 to 44 years	14%	11%	12%
45 to 54 years	19%	20%	18%
55 to 64 years	22%	25%	20%
65 years or older	33%	34%	37%
Household Income			
Under \$25,000	12%	12%	13%
\$25,000 - \$49,999	18%	19%	17%
\$50,000 - \$74,999	16%	16%	16%
\$75,000 - \$99,999	11%	12%	11%
\$100,000 - \$149,999	9%	10%	7%
\$150,000 or more	7%	5%	6%
Prefer not to say	26%	26%	30%
Ethnicity			
White/Caucasian	86%	87%	87%
Asian or Pacific Islander	2%	2%	2%
Native American/Alaska Native	2%	1%	1%
Hispanic/Latino (White/Caucasian)	1%	1%	1%
Black/African-American	1%	1%	1%
Hispanic/Latino (all other or multiple race)	<1%	<1%	<1%
Hispanic/Latino (Black/African-American)	<1%	0%	<1%
Other	2%	2%	1%
Prefer not to say	5%	7%	6%

NOTE: Bold red data indicates significant differences between years.

Respondent Profile

	2012	2013	2014
Total	N=1501	N=1501	N=1508
Average Number Children in Household			
Under 18 years of age	1.73	1.69	1.78
Education			
Less than high school	2%	2%	2%
High school/GED	21%	22%	22%
Professional school/training	6%	5%	5%
Some college	16%	16%	15%
Associate's degree	8%	7%	7%
Bachelor's degree	20%	19%	17%
Some graduate school	3%	5%	4%
Graduate school degree	19%	19%	18%
Prefer not to say	5%	5%	10%
Home Own Status			
Rent	21%	19%	20%
Own	78%	79%	78%
Years In Current Residence			
0 to 5 years	29%	32%	32%
6 to 10 years	14%	13%	12%
11 to 20 years	22%	20%	20%
More than 20 years	34%	34%	35%

NOTE: Bold red data indicates significant differences between years.

Respondent Profile

	2012	2013	2014
Total	N=1501	N=1501	N=1508
Home Type			
Single family	80%	80%	81%
Multi-family/apartment	18%	16%	17%
Other	1%	4%	1%
DK/Not Sure	<1%	<1%	<1%
Main Heat Source For Home			
Oil	53%	49%	48%
Propane Gas	16%	20%	19%
Electric	11%	10%	11%
Wood	7%	9%	8%
Natural Gas	3%	4%	6%
Kerosene	1%	2%	1%
Geothermal Heat Pump	<1%	<1%	<1%
Other	4%	3%	3%
Don't Know / Not Sure	5%	2%	3%

NOTE: Bold red data indicates significant differences between years.