

NJCEP 2008 Residential Survey Report

August 22, 2008

MARKETSTRATEGIES
INTERNATIONAL



Your Power to Save
At Home, for Business, and for the Future

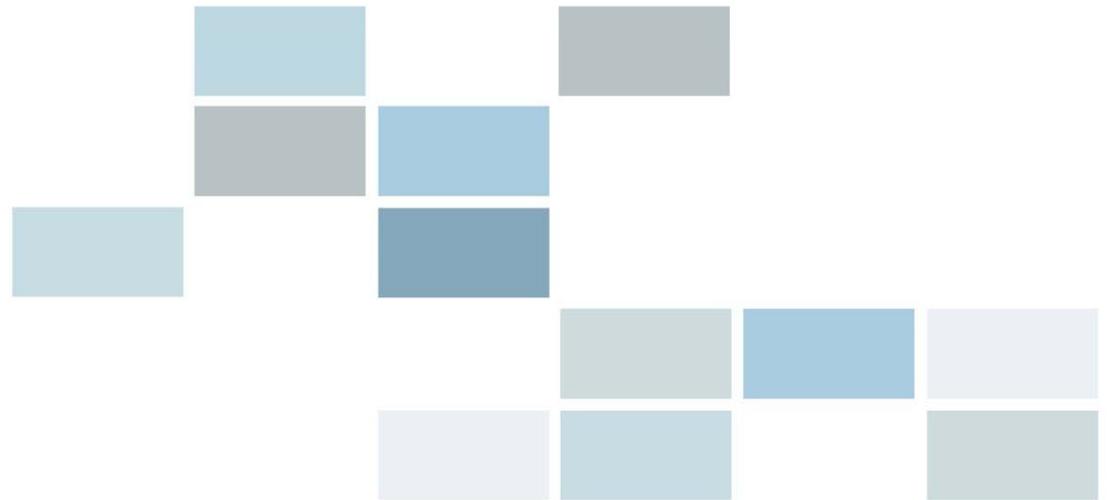
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Executive Summary



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Executive Summary: Awareness/Interest

Energy Efficiency: During the past two years, New Jersey consumers' interest in energy efficiency has grown.

- Sixty-five percent (65%) of consumers now find it very important to limit/reduce energy use in the home -- up from 60% in 2006 -- for a mix of economic and environmental/altruistic reasons.
- About nine out of ten say they have done something in the past two years to conserve energy.

Renewables: Most consumers and program participants* are familiar with renewable energy or clean power and find it important.

- Both measures show big increases compared to 2006.
- About one-fifth of consumers and program participants feel they would benefit "a lot" from buying renewable energy for their home.

There is widespread agreement that investment in new energy technologies and other issues championed by NJCEP are important.

* Note 200 NJCEP program participants were surveyed, along with 601 randomly selected NJ consumers.

Executive Summary: State Role

Very high percentages of both New Jersey consumers and program participants feel that New Jersey should do more to encourage energy efficiency and renewable energy.

About one-quarter of consumers and one-third of program participants know that New Jersey's Clean Energy Program is sponsored by the State of New Jersey. (Consumer awareness is 27%, up from 24% in 2006.)

Awareness of New Jersey Energy Use goals and programs ranges from 20% to one-third of consumers (one-third for the Societal Benefits Charge). Program participants are more aware of most New Jersey Energy Use Goals than are random consumers.

- After it is defined for them, majorities of consumers and of program participants support the Societal Benefits Charge.

NJ consumers currently say their utilities are doing a better job in helping address household energy issues than the State or the Board of Public Utilities.

Executive Summary: Program Awareness and Participation

Program awareness results are mixed:

- Consumers are now less likely than in 2005/2006 to say they are aware of programs available in New Jersey to encourage energy efficiency or clean power. (17% now vs. 22% in 2006)
- However, when asked about specific programs by name, awareness has generally gone up since 2006, and participants tend to be more aware of specific programs than the random consumers.

About one-quarter of consumers and one-third of program participants know that New Jersey's Clean Energy Program is sponsored by the State of New Jersey.

Those who say they have participated in an energy efficiency or renewable energy program (47 respondents) are about equally likely to cite economic and environmental/altruistic reasons.

Among program participants who know that they have participated in a New Jersey energy efficiency or renewable energy program (29 respondents), 52% are extremely satisfied with the program, another 28% are somewhat satisfied.

Executive Summary: Program Interest

Consumers and program participants express strong interest in participating in energy efficiency programs and receiving rebates.

➤ More than 80% are interested in both, up slightly from 2006.

Only about three-in-ten say they are willing to pay* for a comprehensive home assessment, but most who are willing to pay say they will pay at least \$50.

About three-in-ten say they would be very likely to participate* in a renewable energy program and more than one-quarter would be very likely to install a device to monitor energy use.

*** Caution: Likelihood to Pay/Participate provides a good measure of relative interest in programs, but is not a forecast of actual behavior in the marketplace.**

Executive Summary: Program Interest

The survey briefly described five specific programs and asked “likelihood to participate.”*

- The programs that generate the greatest interest, based on “very likely to participate” response, are Energy Star Products, Energy Star Homes, and HVAC. (23%-37% of consumers say they are very likely to participate).
 - In addition, half say that mail-in rebates would make them much more likely to select Energy Star products.
- The Home Performance with Energy Star Program falls near the low end on “very likely to participate.”
 - At most price points between \$99 and \$250, about 10%-12% of consumers say they are very likely to participate, with little evidence of drop-off as the price assumption is increased.
- Nine percent (9%) of consumers say they are very likely to participate in Clean Power Choice.

*** Caution: Likelihood to Participate provides a good measure of relative interest in programs, but is not a forecast of actual behavior in the marketplace.**

Executive Summary: Information Channels

Information seeking is on the rise:

- Forty seven percent (47%) of NJ consumers sought information on energy saving products or services during the past year; an increase compared to 2006 (39%) and 2005 (22%). About seven-in-ten program participants sought such information.
- One-third of consumers (up from 22% in 2006) and two-fifths of participants recall reading, seeing, or hearing about a clean power, renewable energy, or energy efficiency program being made available. Most recall the source as TV or newspaper.
- The Internet is seen as the predominant source of information for learning more about improving the energy efficiency of the home, followed by utilities.
- The Internet and utility companies are seen as the primary sources to contact to sign up for clean power or renewable energy.
- Four percent (4%) of consumers say they have visited the NJCEP website and 2% say they have visited the Clean Power Choice website, both the same as in 2006.

Executive Summary: Conclusions and Implications

In the past two years, New Jersey consumers' awareness, interest, and participation in energy conservation/efficiency have increased. They are motivated by a mix of straightforward economic concerns and more altruistic/social considerations, such as the environment (especially global warming) and energy independence.

NJ consumers have also grown more aware of, familiar with, and interested in renewable energy. Many believe they can benefit from using clean power in their homes.

- *The present economic and public opinion climate strongly favors continued expansion of NJCEP's impact among NJ consumers.*
- *Now would be a good time, if possible, to increase the resources available for consumer programs in order to take advantage of this opportunity.*

Executive Summary: Conclusions and Implications

State of New Jersey activities in support of energy efficiency and clean power enjoy widespread awareness and support among NJ consumers. There is majority support for the Societal Benefits Charge.

However, the State and the BPU do not receive high ratings for their efforts to help NJ households address energy issues. Utilities are viewed more positively in this regard.

- *This survey and recent qualitative research suggest that there is work to do to improve consumer perceptions:*
 - *Simplify program designs*
 - *Reduce bureaucracy*
 - *Be easier to do business with*
 - *Improve/increase communication about what the State and the BPU are doing*

Executive Summary: Conclusions and Implications

Despite the growing public focus on energy and environmental issues during the past two years, the survey results are mixed when it comes to awareness of programs: general awareness is down a bit, aided awareness of specific programs is up, and awareness of advertising and publicity is up.

- *This underscores the need for investment now in enhanced communication strategies to address the perception that “the State should be doing more” and to take advantage of the wave of public sentiment – pro-efficiency, pro-alternative energy, pro-environment – that have the potential to drive increased awareness of and interest/participation in NJCEP programs..*

Several of the specific program designs tested in this survey have strong appeal among NJ consumers.

- *These programs should be promoted as aggressively as possible using a mix of tactics, with emphasis on the two cost-effective information channels favored most by consumers: the Internet and utility partnerships.*

Executive Summary: Conclusions and Implications

The program participants surveyed differ from the general public in a number of ways that might be expected: more aware, more “green,” more knowledgeable about State/BPU/NJCEP programs and activities. However, they do *not* appear to constitute a small, unique niche; on many measures, their opinions and preferences are very similar to those of the “random sample” consumers.

- *This suggests that the opportunity to expand NJCEP programs is not constrained because a limited, core target market has already been highly penetrated. There appear to be many additional consumers NJCEP can target who are a lot like the current participants.*

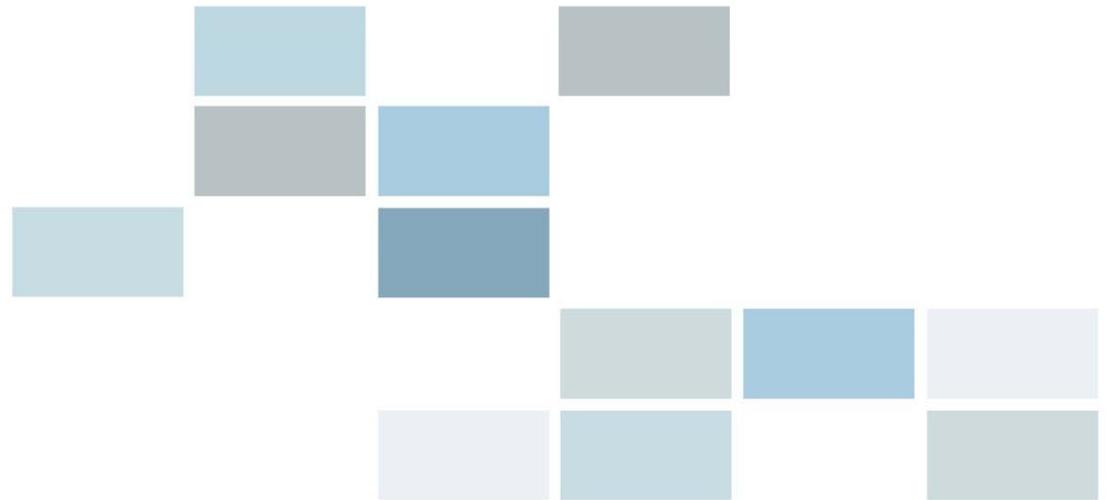
It is striking, though, that many participants do not self-identify as having participated in a program – they appear to be unaware that they did so. This may relate to a recent qualitative research finding that many are dependent on trade allies and do not really understand who is providing the incentives and other benefits they receive.

- *By improving direct communication with participants, NJCEP may have an opportunity to turn some of them into an effective, growing cadre of advocates for the organization and its programs.*

Research Objectives & Methodology



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Research Objectives

This survey of New Jersey residential customers was designed to:

- Measure perceptions of, and interest in, current and new programs and communication designs.
- Aid in program design by measuring customer receptiveness to alternative program designs/attributes and identifying roadblocks to participation.
- Aid in communication planning by measuring customer preferences for various media, methods of communication, and value propositions.
- Understand the effectiveness – strengths and weaknesses – of New Jersey’s efforts to date to increase consumer awareness, interest and participation.
- Track some of the key perceptions measured in prior consumer surveys conducted in 2005 and 2006, in order to measure changes in awareness, media/communication preferences, interest, attitudes and behaviors relevant to energy efficiency, clean power and the state’s programs designed to promote them.
- Understand more fully consumers’ multiple motivations for getting involved with energy efficiency and clean energy.

Research Objectives (cont.)

- Determine whether the focus group finding that consumers have very low awareness of State activities is confirmed by the quantitative survey.
- Test strategies for addressing consumer objections to paying the upfront costs of whole house audits, and their overall distrust of contractors.
- Include an adequate representation of program participants, to confirm or challenge focus group findings about them, including their low program awareness, reliance on trade allies, etc.

Methodology

Telephone survey of 800 New Jersey residential customers conducted July 18th through July 27th, 2008.

Respondents are primary decision-makers or share in energy decision making for the household.

Some results are “tracked” – compared to findings of a similar survey conducted in the fall of 2005 and 2006.

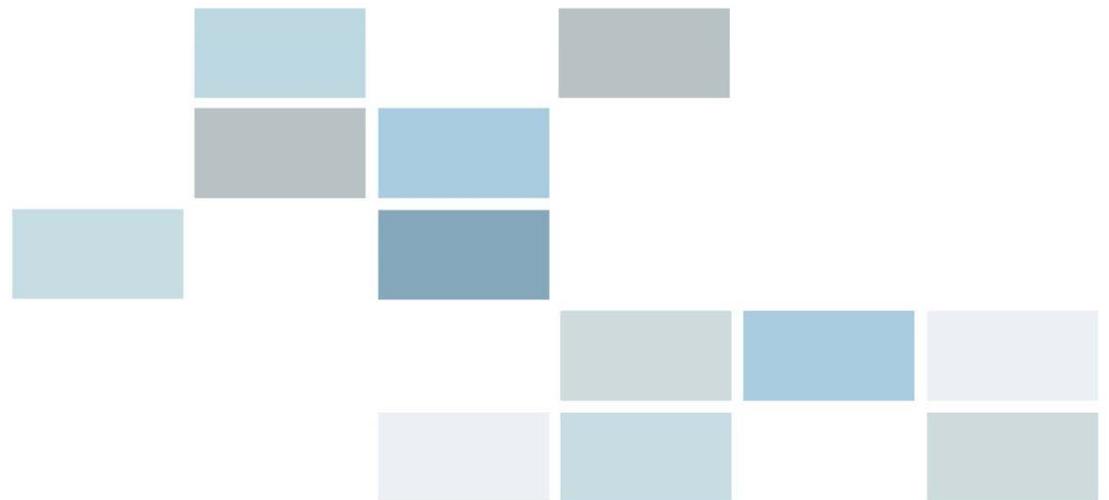
Where appropriate, 2008 results are reported separately for two sample groups:

- Random sample: 601 residential customers.
- Program Participants: Includes 17 Solar participants and 183 Energy Efficiency program participants from lists supplied by NJCEP.
- Sample sizes throughout the report are 601 for random respondents and 200 for program participants, except where otherwise noted.

Attitudes About Energy and Climate Change

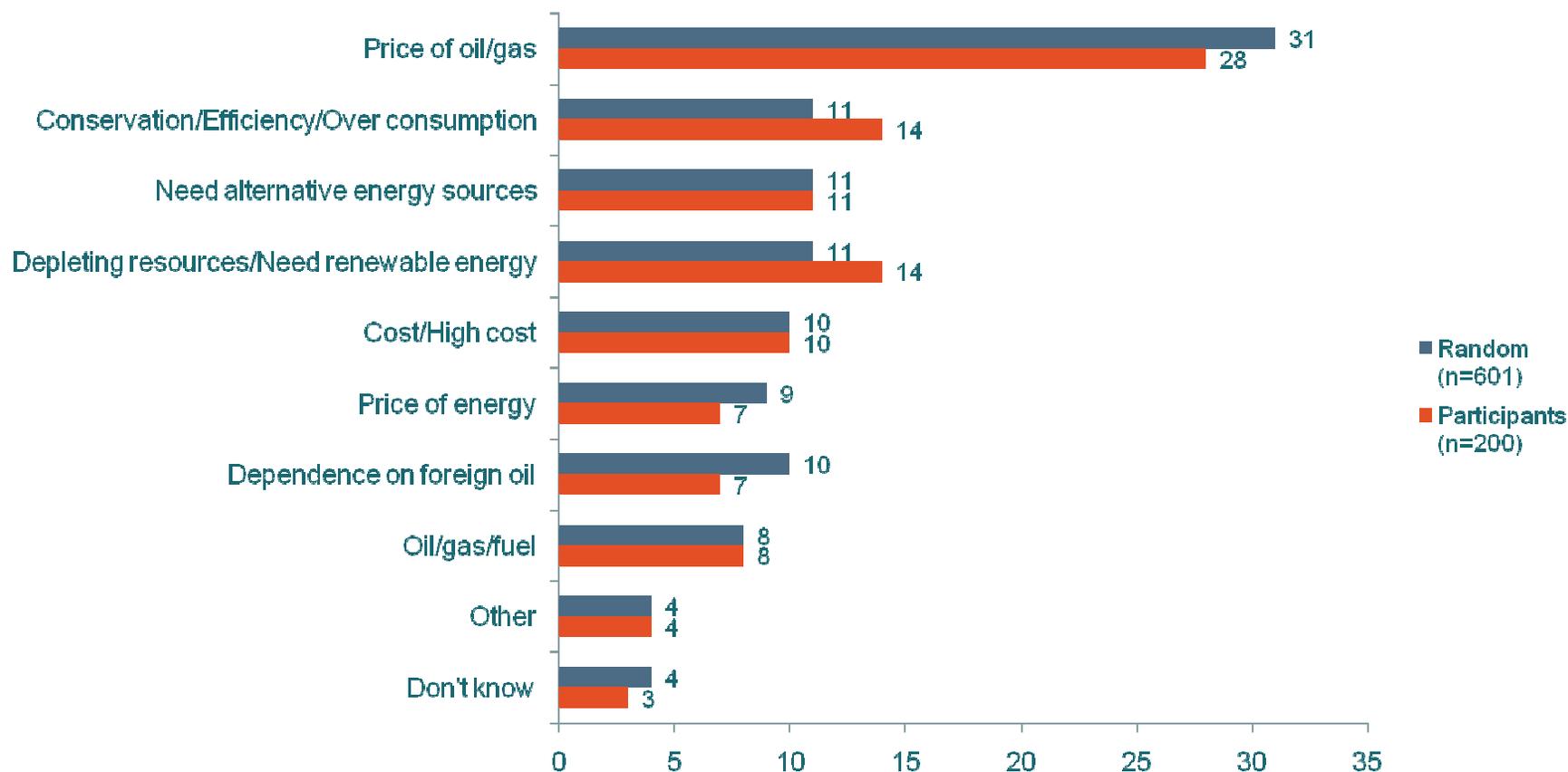


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About three-in-ten feel the most important energy-related issue facing the U.S. today is the price of oil or gas, clearly the most frequently mentioned response.

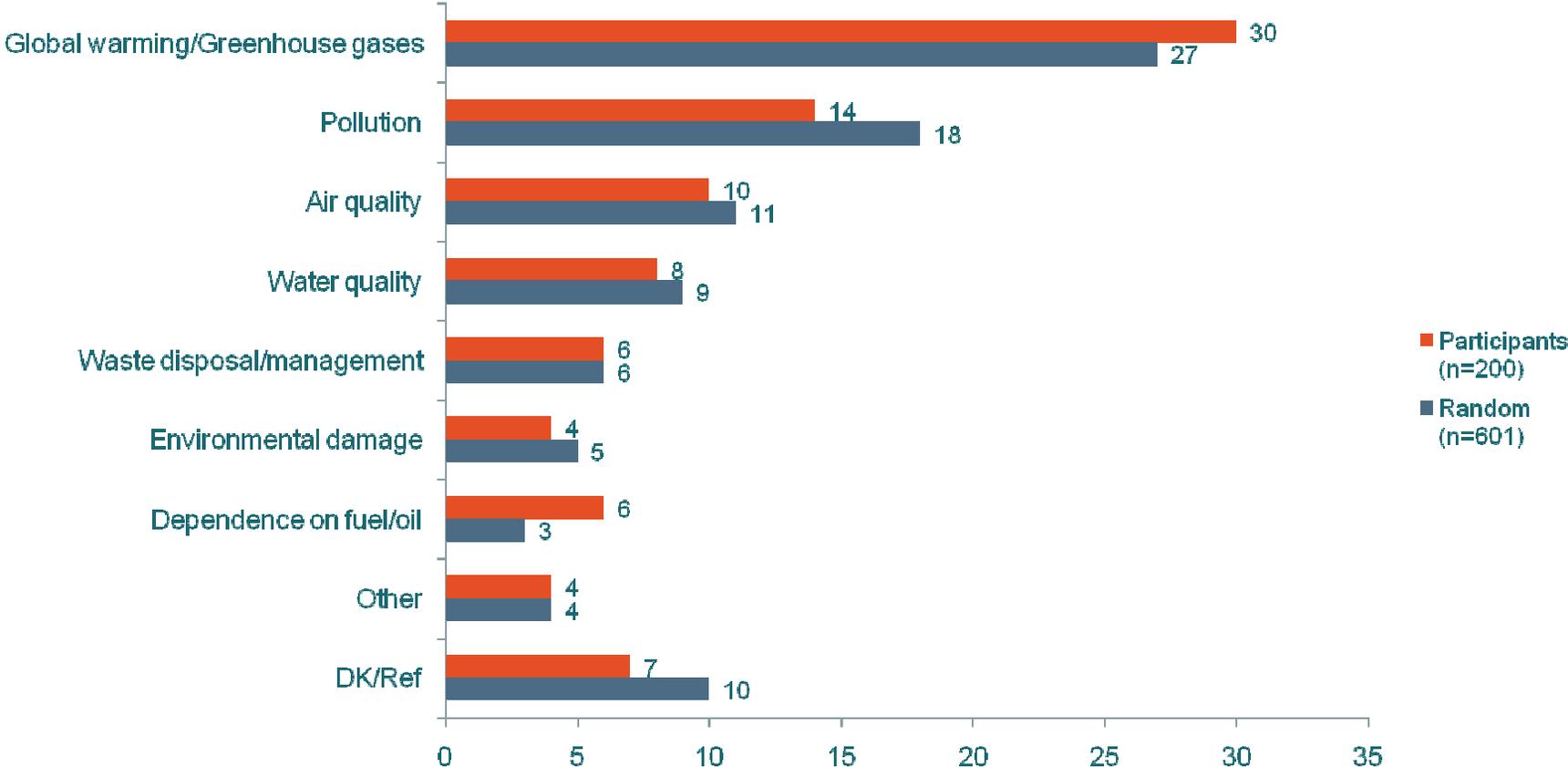
What do you feel is the most important energy-related issue facing the U.S. today?
(% of Respondents)



A2A. What do you feel is the most important energy-related issue facing the U.S. today?

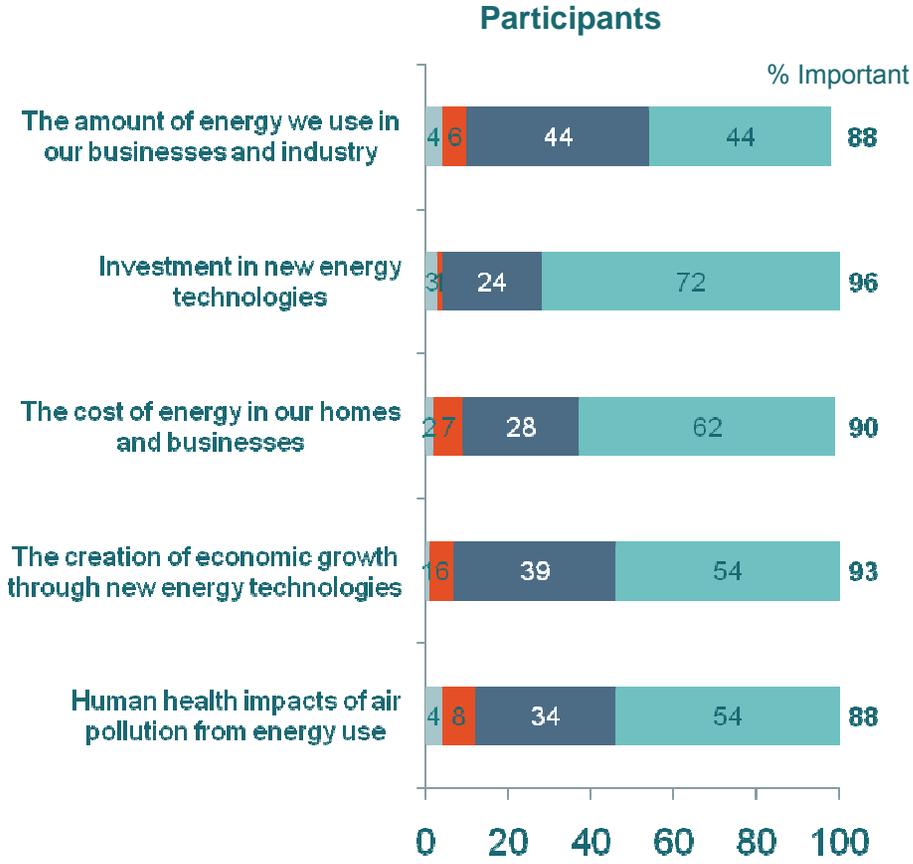
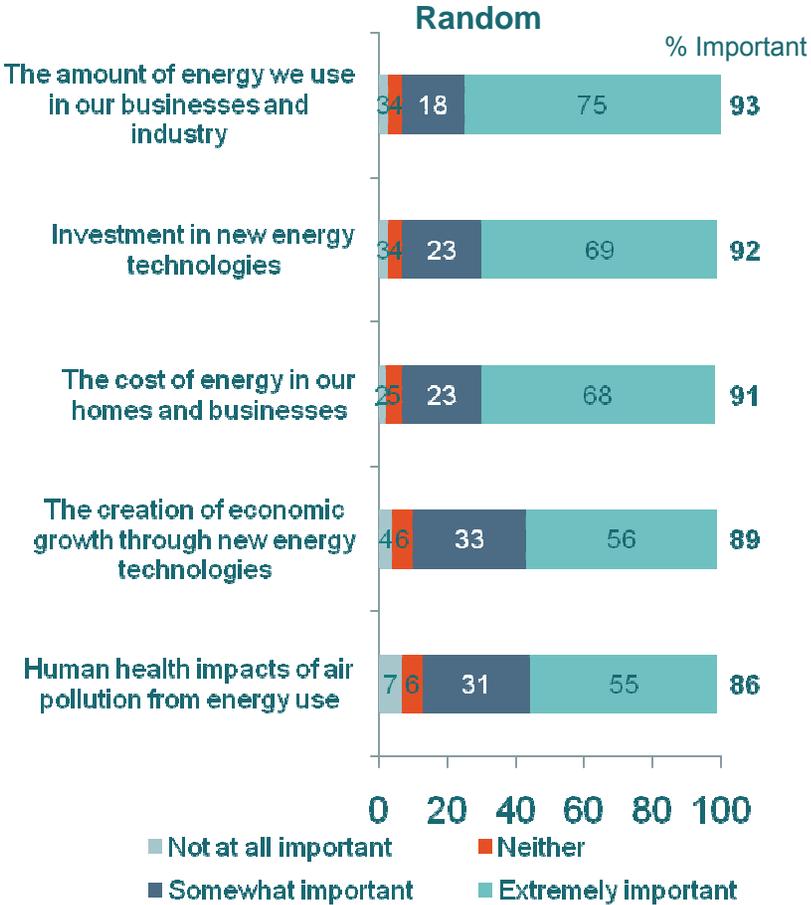
Global warming/greenhouse gases are seen as the most important environmental issue facing the U.S. today, followed by pollution, air quality, and water quality.

What do you feel is the most important environmental issue facing the U.S. today?
 (% of Respondents)



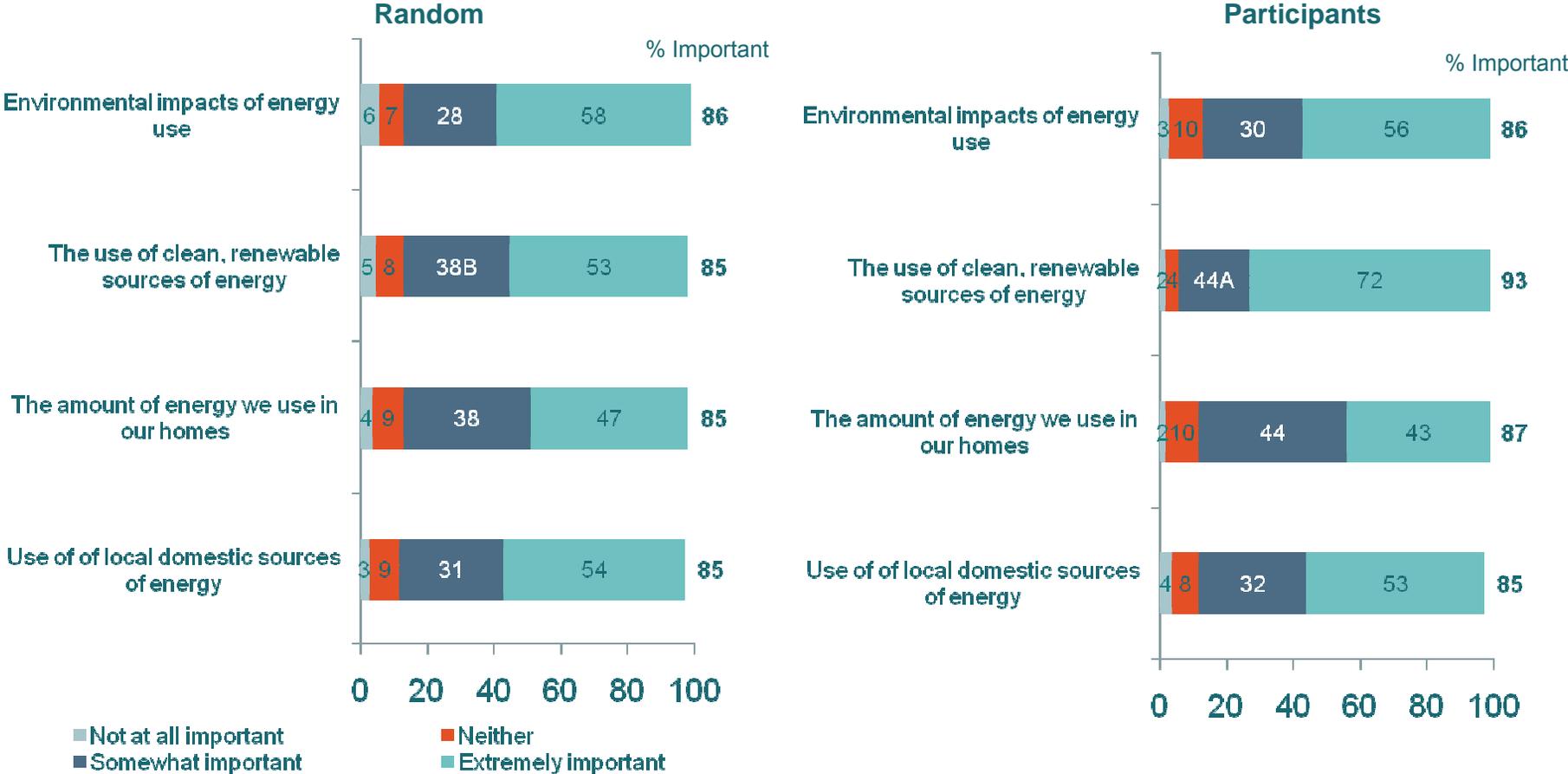
A2B. What do you feel is the most important energy-related issue facing the U.S. today?

There is widespread agreement that investment in new energy technologies and other issues championed by NJCEP are important .



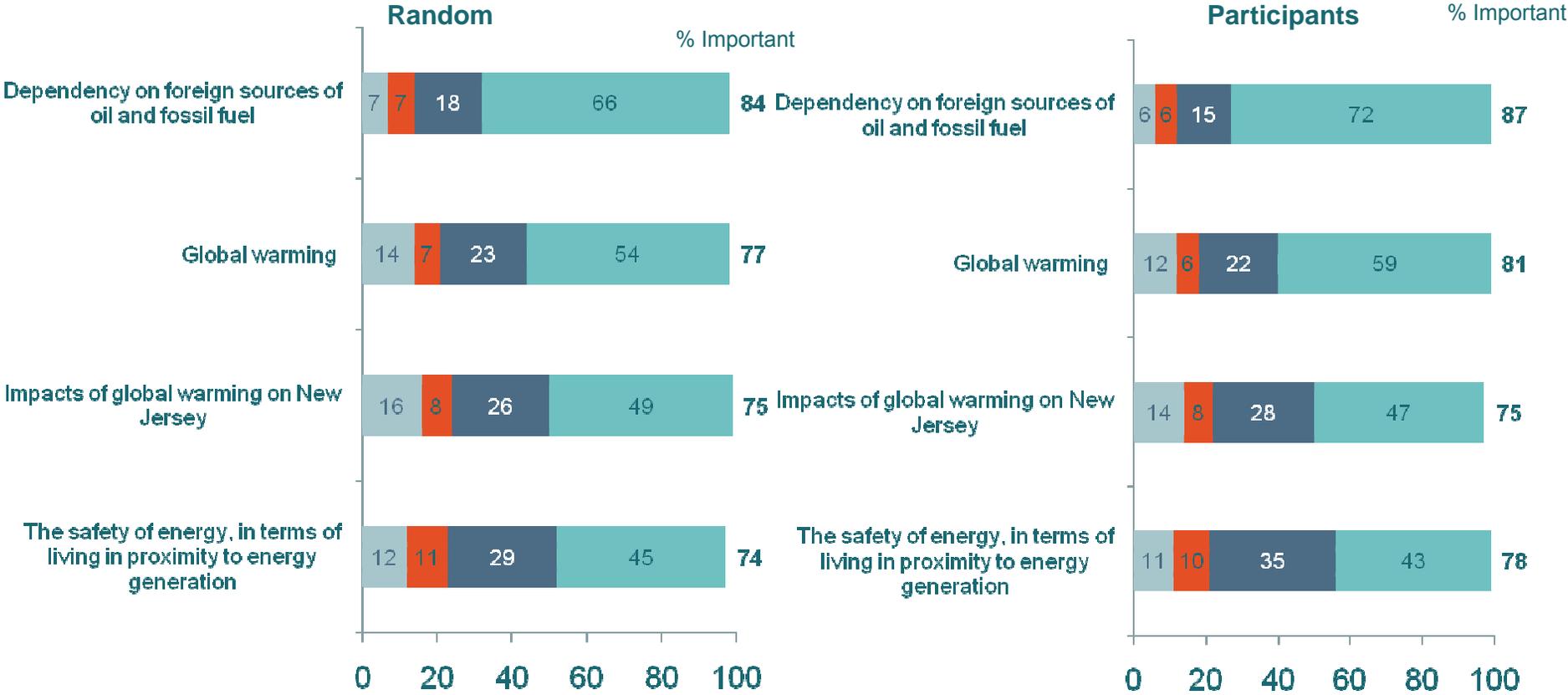
A1A-A1M. Please rate each of the following issues that I'll read on a zero to ten point scale, where zero means the issue is not important at all and a ten means the issue is extremely important. You can use any number from zero to ten. How important is...

More than half of consumers and seven-in-ten participants say that the use of clean, renewable sources of energy is very important.



A1A-A1M. Please rate each of the following issues that I'll read on a zero to ten point scale, where zero means the issue is not important at all and a ten means the issue is extremely important. You can use any number from zero to ten. How important is...

More than eight-in-ten cite dependency on foreign sources of oil and fossil fuel as important.

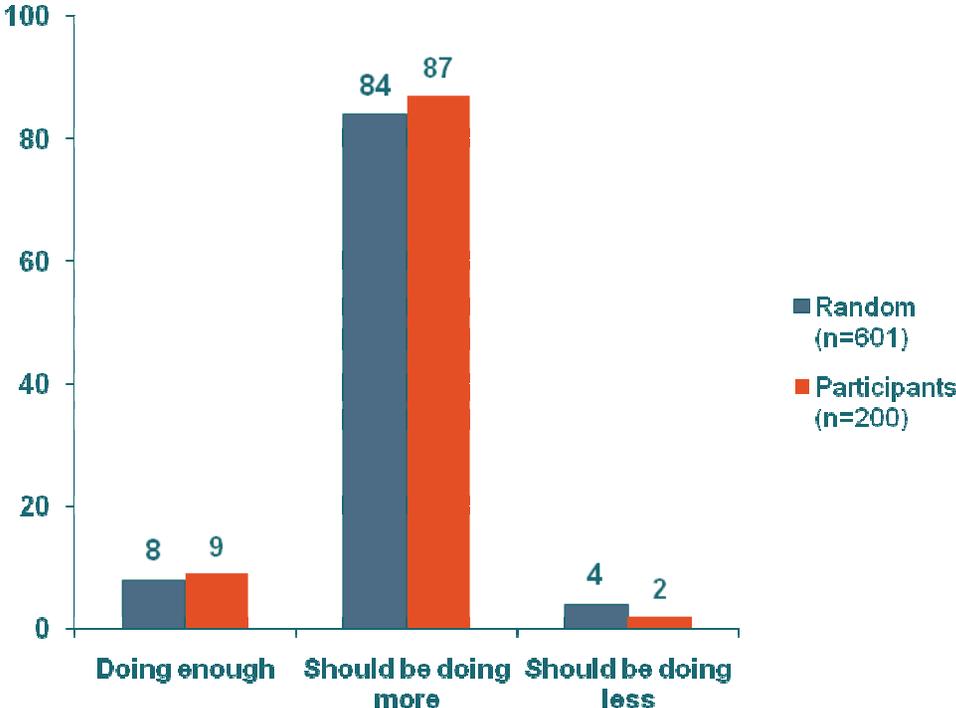


■ Not at all important ■ Neither ■ Somewhat important ■ Extremely important

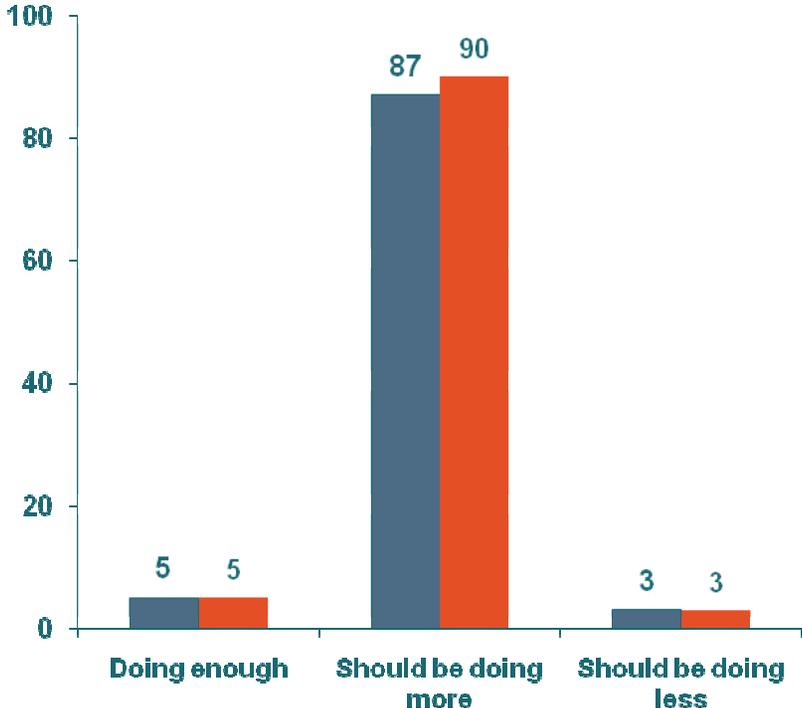
A1A-A1M. Please rate each of the following issues that I'll read on a zero to ten point scale, where zero means the issue is not important at all and a ten means the issue is extremely important. You can use any number from zero to ten. How important is...

Very high percentages of both consumers and participants feel that New Jersey should do more to encourage energy efficiency and renewable energy.

State of New Jersey Encouraging Energy Conservation and Energy Efficient Products

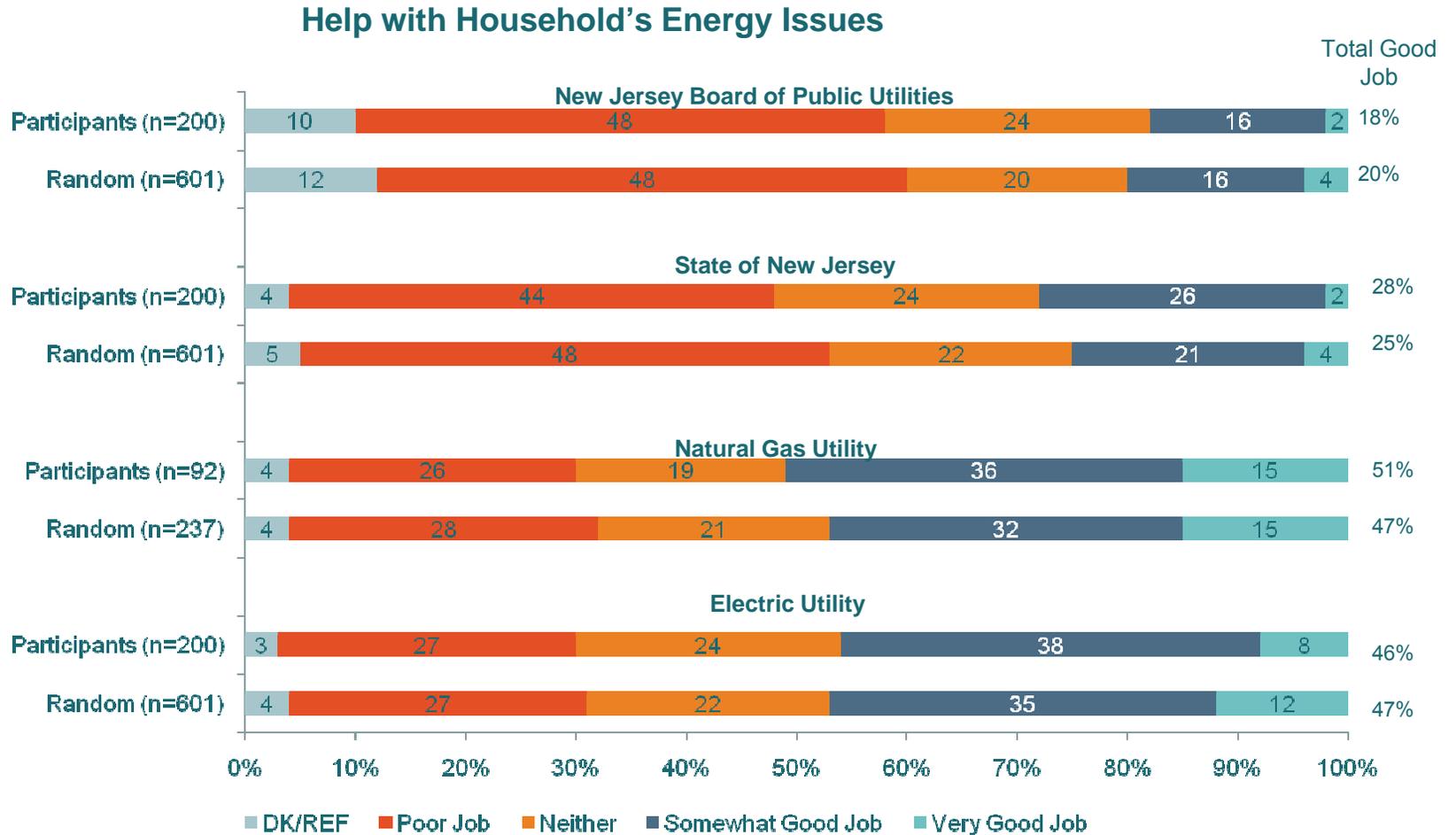


State of New Jersey Encouraging Use of Renewable Energy Sources



A3. Is the state of New Jersey doing enough to encourage people to conserve energy and use energy efficient products, should it be doing more on this issue or should it be doing less?
 A4. Is the state of New Jersey doing enough to encourage the use of renewable energy sources, should it be doing more on this issue or should it be doing less?

Consumers and participants that say their utilities are doing a better job in helping address household energy issues than the State or the Board of Public Utilities.

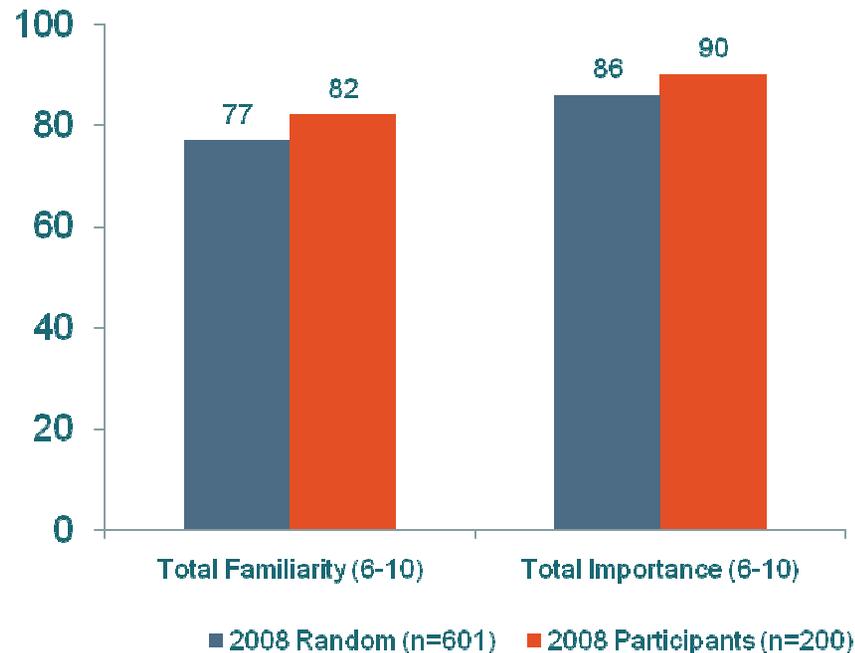


P1-P1C. Using a zero to ten point scale, where a zero means poor and ten means excellent, please tell me how good a job you thinkdoes in helping you address your household's energy issues.

Most consumers and program participants are familiar with renewable energy or clean power and find it important; both measures show big increases compared to 2006.

Familiarity and Importance of Renewable Energy or Clean Power

(% 6-10)



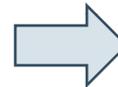
In 2006, 56% (n=800) were familiar with renewable energy and 69% found it important

In 2005, 74% (n=800) were familiar with renewable energy and 87% found it important

A7. How familiar are you with the concept of **renewable energy or clean power**, where power is derived from energy sources that have a minimal impact on the environment and that replenish themselves over short periods of time? Are you...

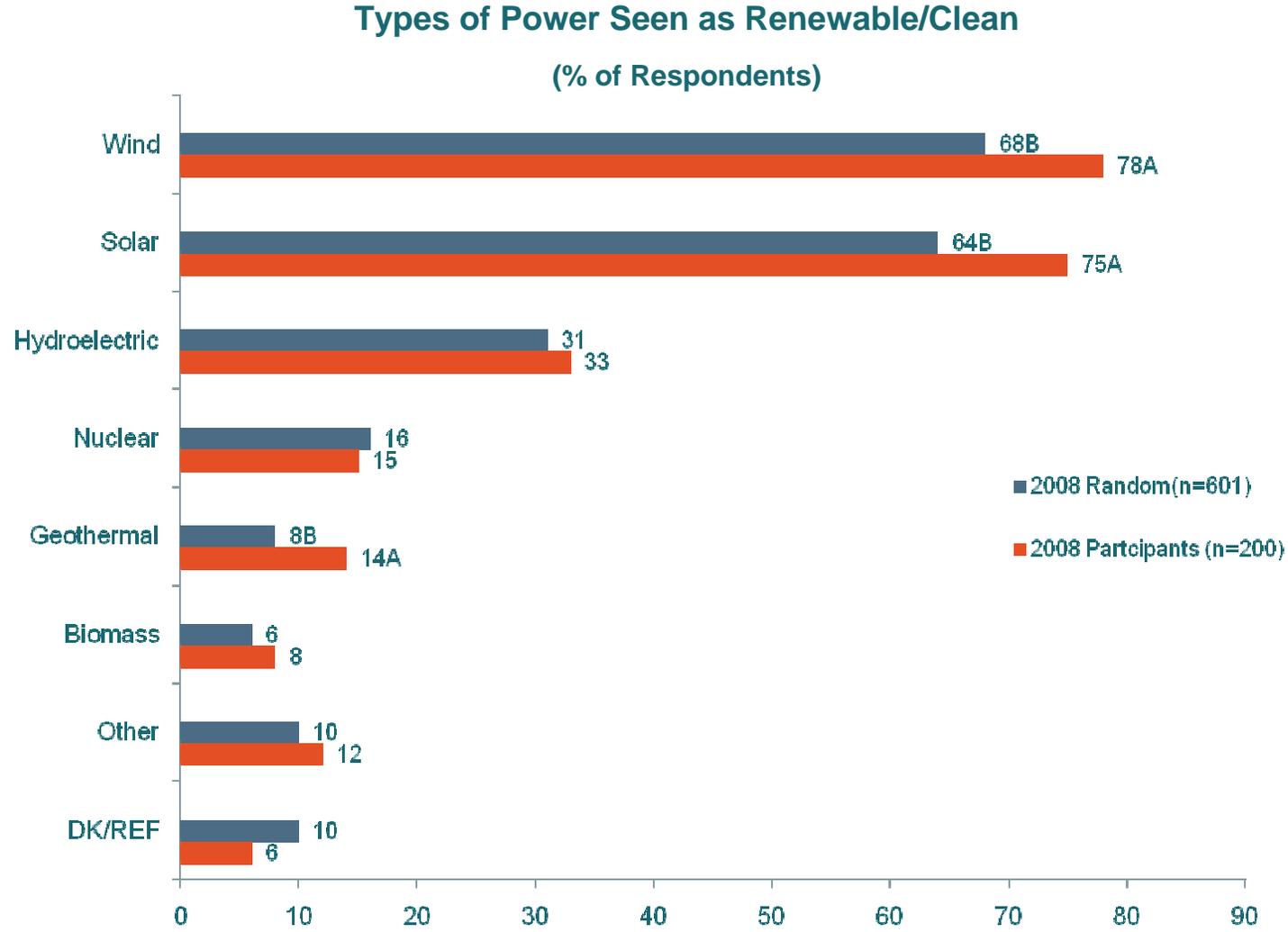
A8. Currently, how important is it to you that the energy you use in your home comes from renewable energy sources such as wind, solar and water power? Is it...

A8A. Why do you say that?



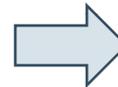
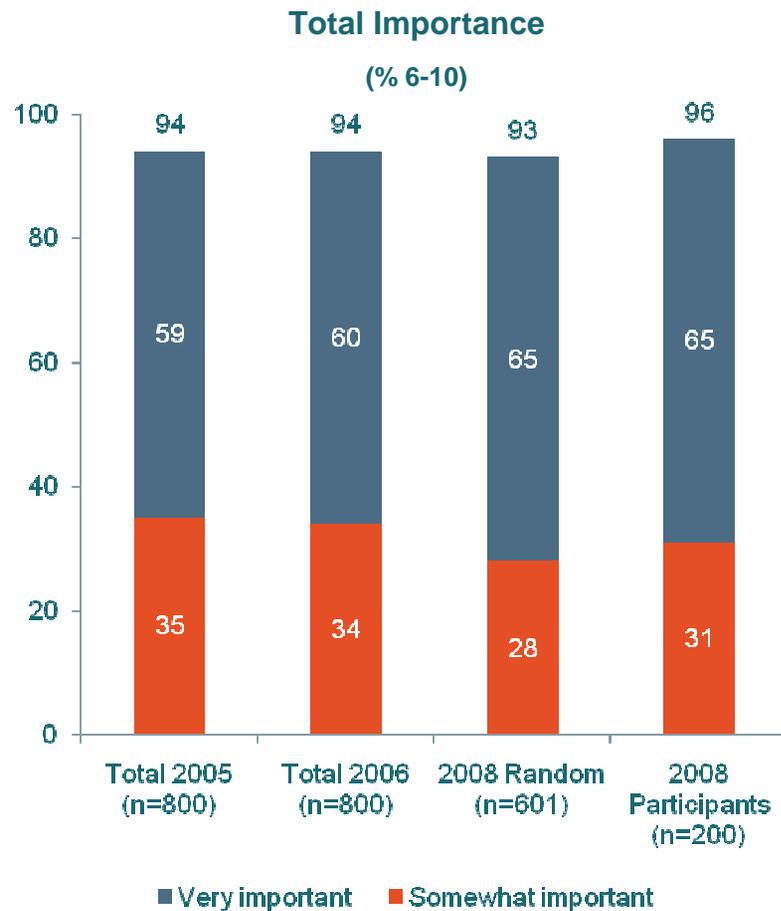
Why Important	Random (n=589)	Participants (n=197)
Cost issue	27%	20%
Save depleting resources	20	21
Need alternative energy sources	14	18
Protect the environment	13	14
Reduce dependence on foreign sources	11	11
Reduce pollution/cleanliness	9	14
Reduce use of oil/fossil fuels	7 B	13 A
It's good/We need it	8	9
Conservation/efficiency	6	8
Not readily available to me	5	4
Need to invest in the future	4	5
Alternative sources need to be developed more	4	5
Other	9	9
Don't know	4	2

Program participants are more likely to view several sources as renewable or clean than are randomly selected consumers.



A8C. Based on your knowledge, what types of power would you consider to be renewable or clean?

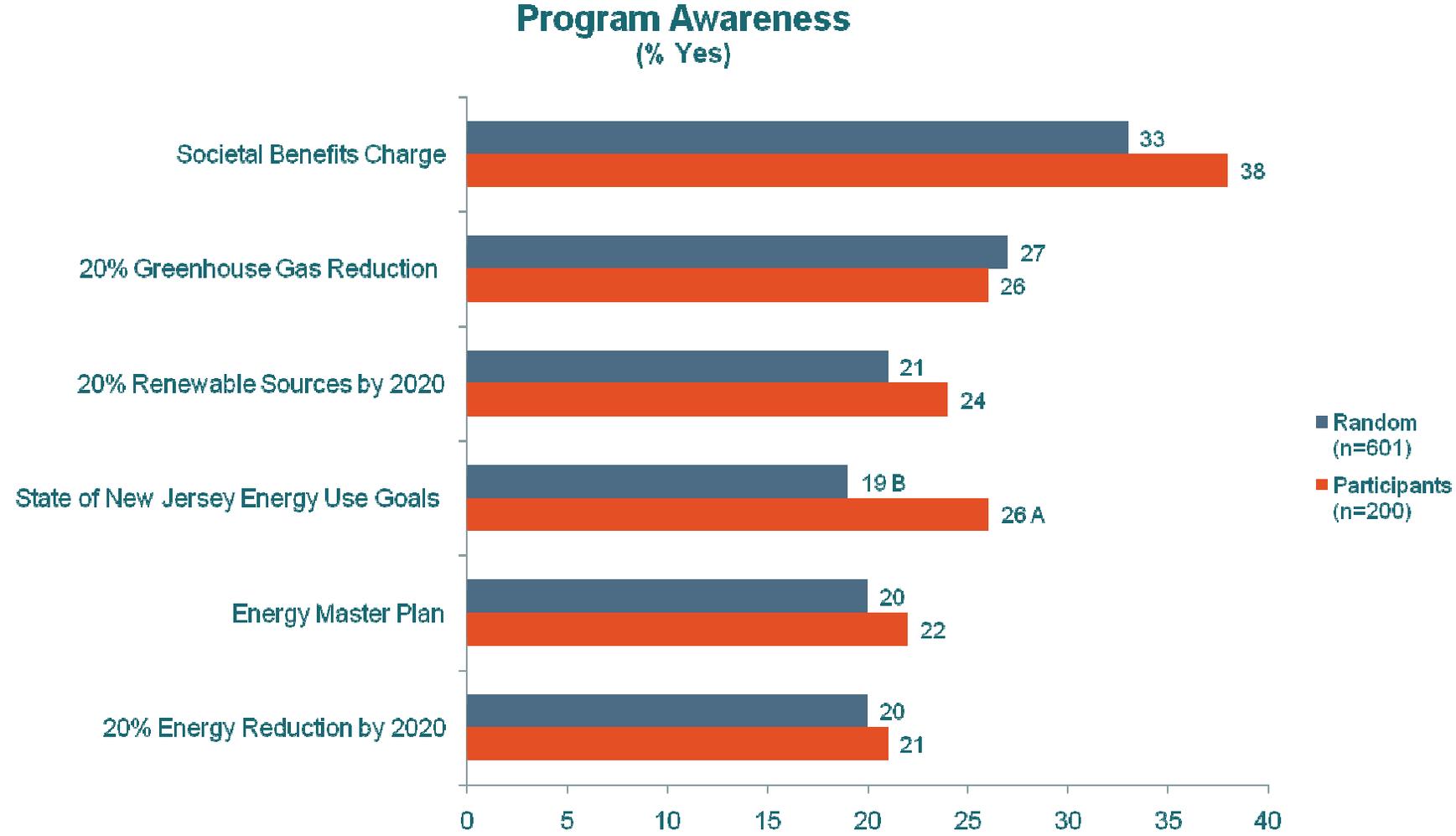
The majority of consumers and participants find it very important to limit/reduce energy use in the home, for a mix of cost and environmental/altruistic reasons.



Why Important	2008 Random (n=594)	2008 Participants (n=198)
Cost/To save money	53%	55%
Good for the environment	19 B	29 A
To conserve energy resources	17	12
Don't like to waste energy	6	6
To keep energy prices down	6	6
Everyone should do their part	4 B	7 A
To help future generations	3	4
To reduce dependence on foreign countries	0 B	4 A
Other	8	6
Don't know/Refused	0	0

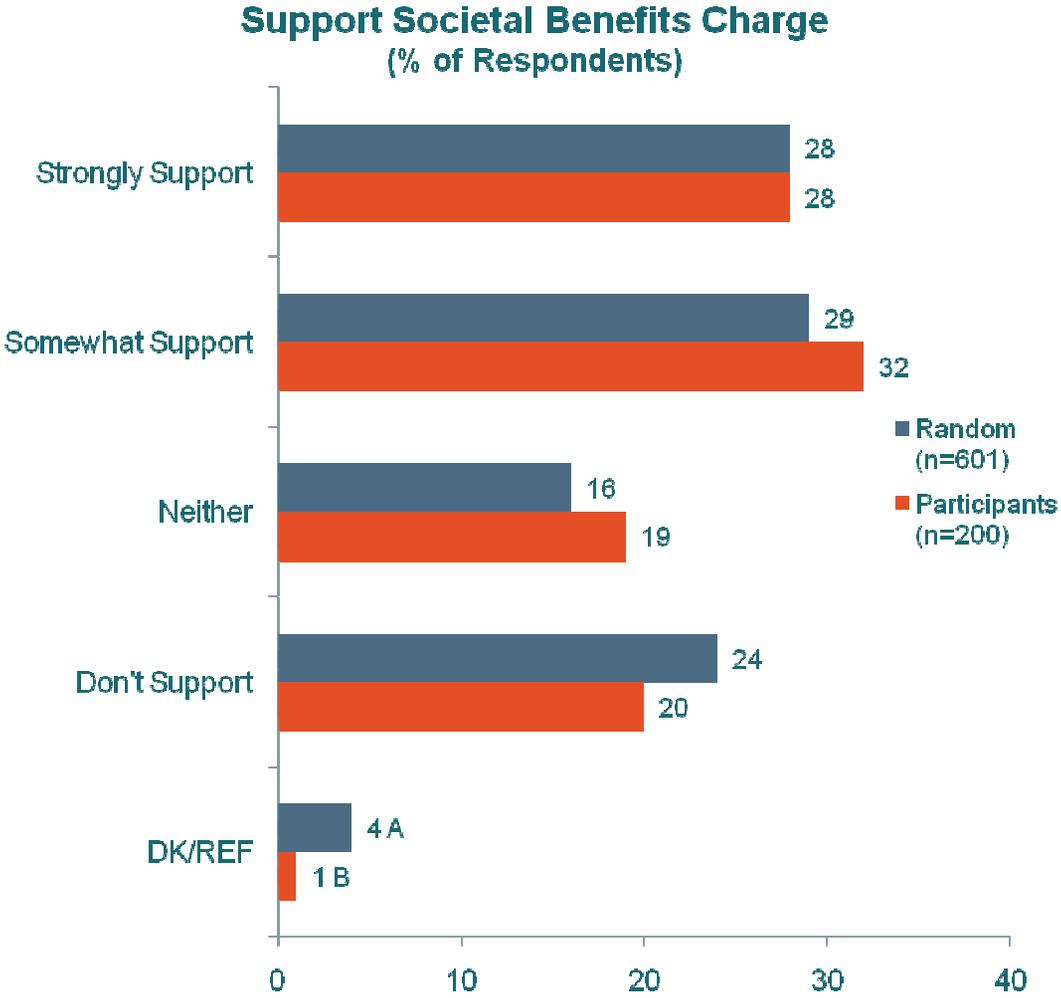
A9. How important is it to you to limit or reduce the amount of energy used in your home? Is it ...

About one-third are aware of the SBC (aided). Program participants are more aware of most New Jersey Energy Use Goals than are random consumers.



A9E-A9H. Are you aware that....

After it is defined for them, majorities of consumers and of program participants support the Societal Benefits Charge.



Societal Benefits Charge:

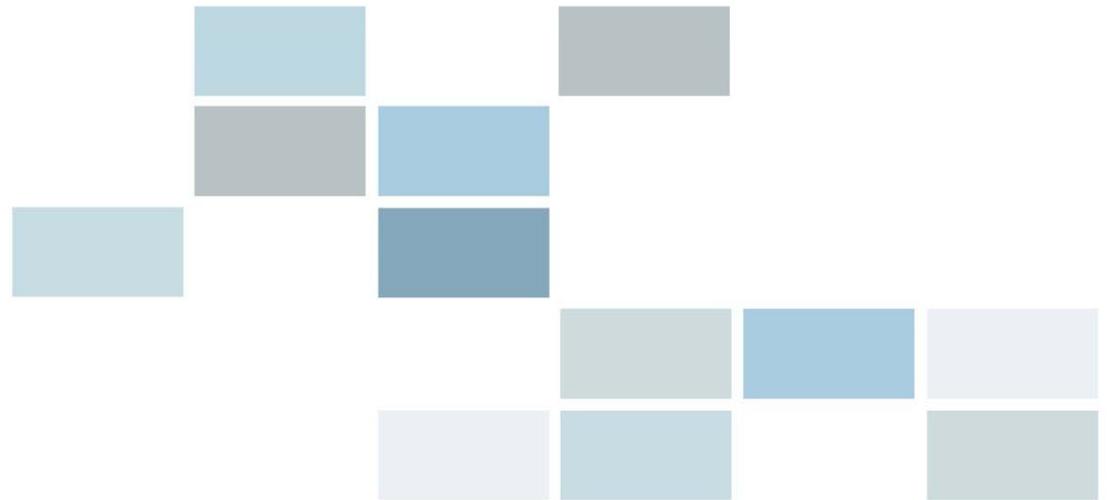
All customers contribute approximately 3% of their monthly electric and natural gas bills to the SBC fund. A portion of the funds are used to pay for clean energy programs that offer all New Jersey residents, businesses, and municipalities, incentives and rebates for the installation of energy efficient and renewable energy technologies.

A3H. Support for collection of Societal Benefits Charge through company's energy bill.

Behaviors, Needs, and Interests



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About nine out of ten say they have done something in the past two years to conserve energy. Many participants installed an energy efficient heating or cooling system, and many participants say they received financial assistance.

Have you or your family done anything in the past two years to conserve energy?

	2008 Random (n = 601)	2008 Participants (n=200)
Yes	87%	94%

Did you receive any financial assistance in the form of a rebate or incentive to reduce costs?

	2008 Random (n = 522)	2008 Participants (n=188)
Yes	15% B	73% A

Among those who answer yes:



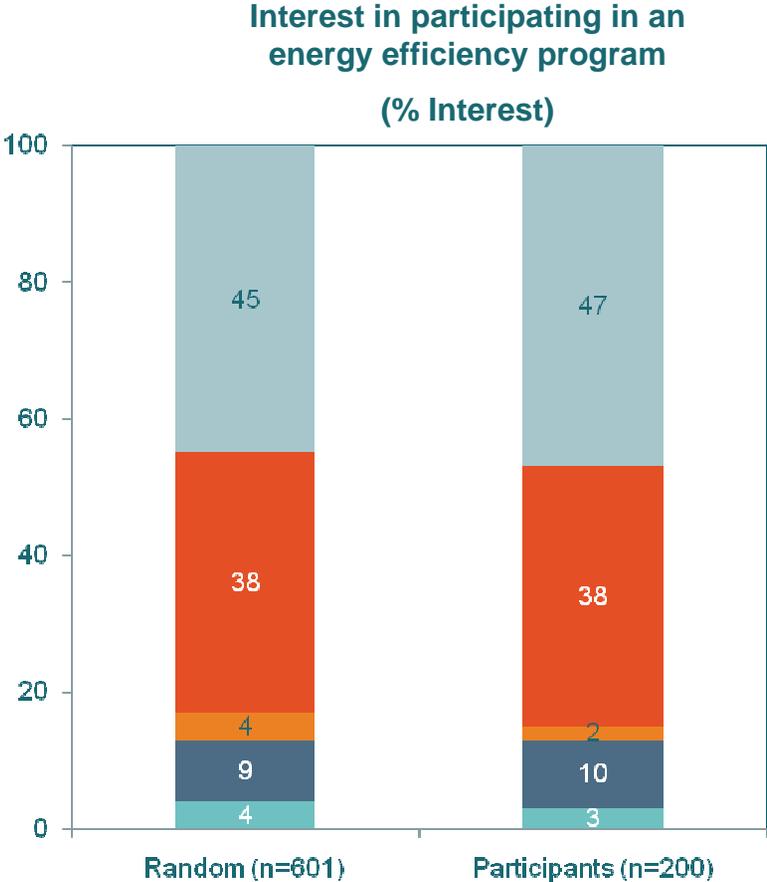
Action Taken	2008 Random (n=601)	2008 Participants (n=200)
Buy energy efficient appliances or light bulbs	47%	58%
Turn off appliances, computer, lights when not in use	32	18
Install a more energy efficient heating or cooling system	19	47
Use air conditioner less	24	18
Replace windows	22	26
Add/replace insulation	21	19

A10. Have you or your family done anything in the past two years to conserve energy, reduce your household energy usage or increase your home's energy efficiency?

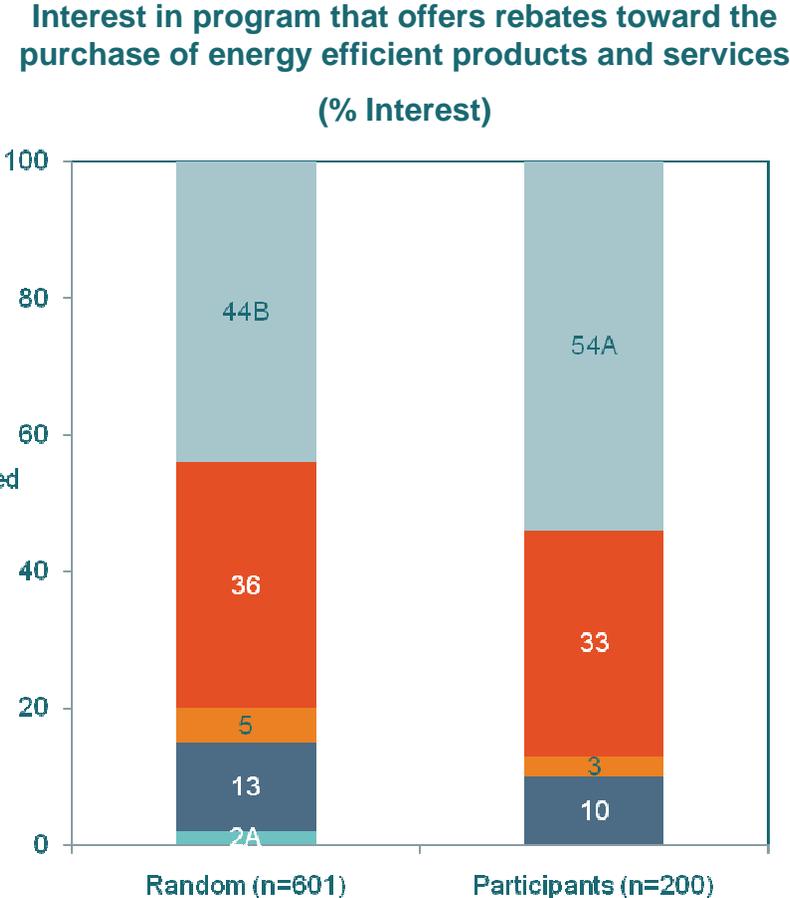
A11. What types of things have you done?

A11B. Did you receive any financial assistance in the form of a rebate or incentive to reduce costs?

Consumers and program participants express strong interest in participating in an energy efficiency program and in rebates.



In 2006, 80% of respondents were interested in participating in energy efficiency programs

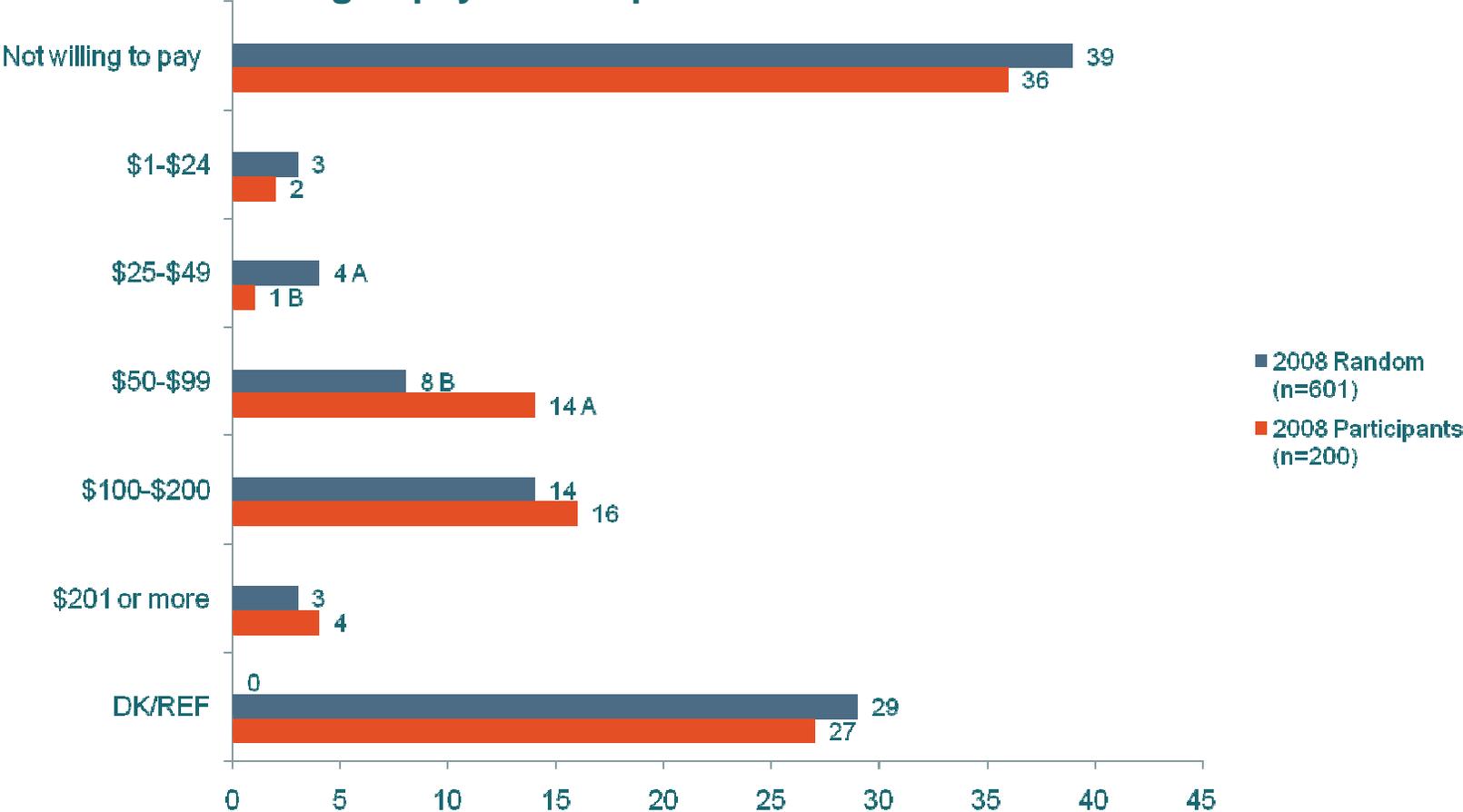


In 2006, 83% of respondents were interested in a program that offers rebates towards the purchase of energy efficient products and services

A20. How interested would you be in participating in an energy efficiency program that saves energy and reduces your electric or heating bill? Would you be...
 A21. How interested would you be in participating in a program that offers rebates toward the purchase of energy efficiency products and services? Would you be...

Only about three-in-ten say they are willing to pay for a home assessment, but most who are willing to pay say they will pay at least \$50.

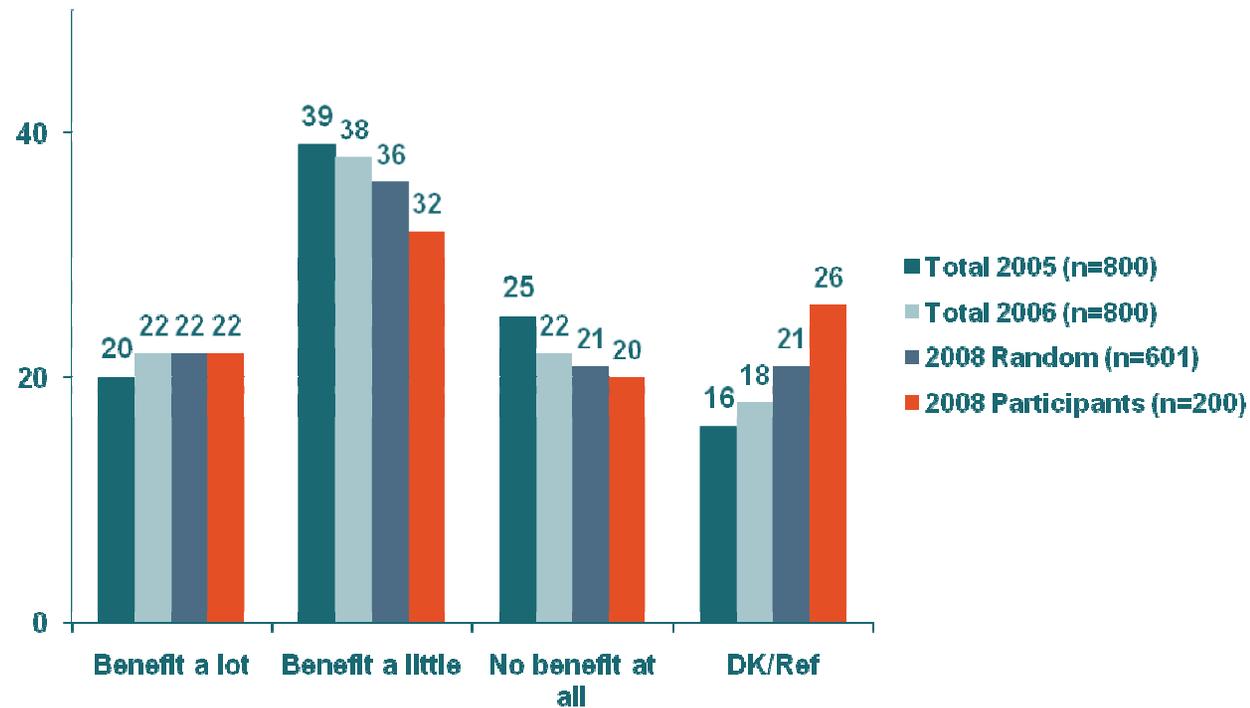
Amount willing to pay for comprehensive home assessment



A22. How much would you be willing to pay for a complete comprehensive home assessment that would expertly measure how much energy your home is using and may be wasting? You would receive a detailed report with recommendations for improving your home's efficiency that would be designed to save you money over time.

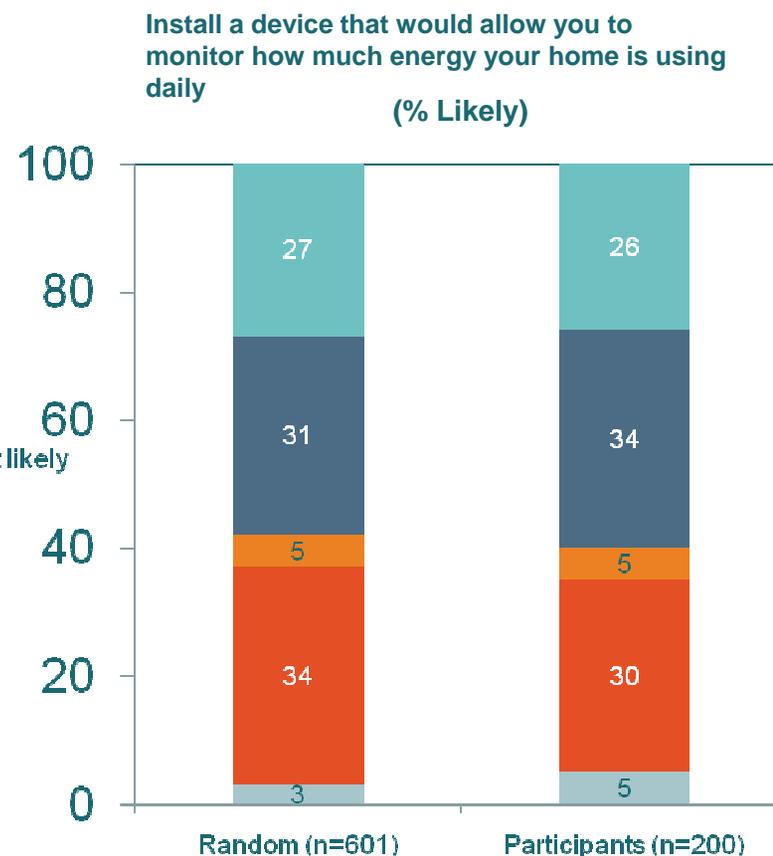
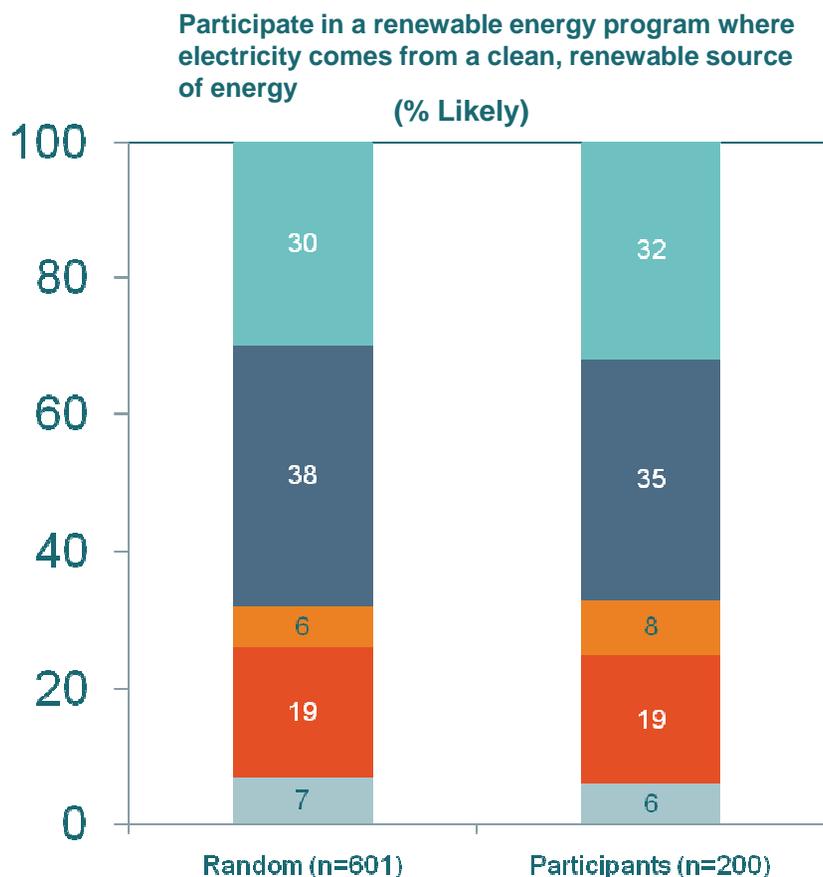
About one-fifth of consumers and program participants feel they would benefit “a lot” from buying renewable energy for their home.

Benefit from buying your home's electricity from renewable energy



A27. In thinking about the energy you use in your home, how much do you think your household would benefit from buying your home's electricity from renewable energy sources through your utility or a competitive supplier? Would you benefit a lot, a little, or not at all from this?

About three-in-ten would be very likely to participate in a renewable energy program; more than one-quarter would be very likely to install a device to monitor energy use.



In 2006, 78% (n=800) were likely to participate

In 2005, 65% (n=800) were likely to participate

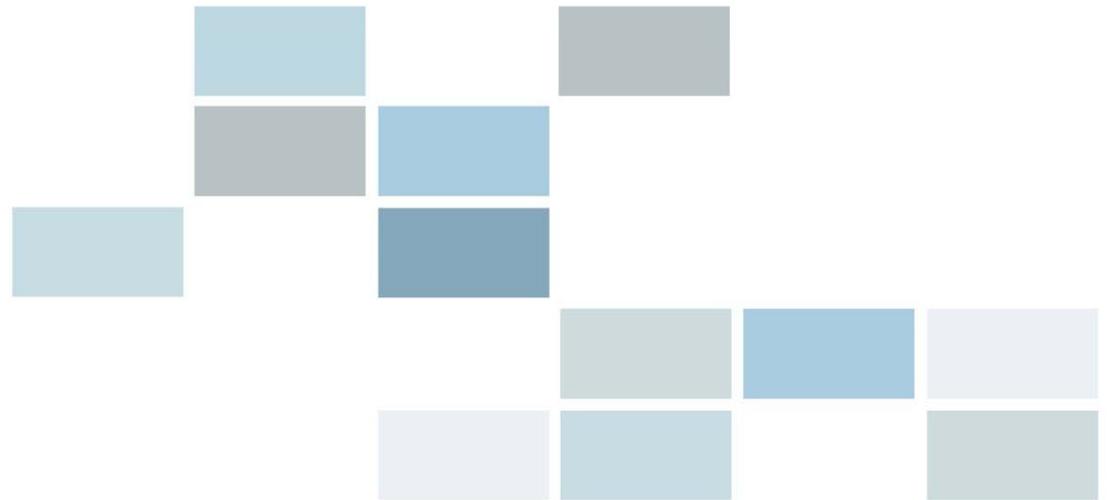
A25. How likely would you be to choose to participate in a clean power or renewable energy program...

A25A. How interested would you be in installing a device in your home that would allow you to monitor how much energy your home is using daily and show you how much you can save by using appliances and lighting efficiently?

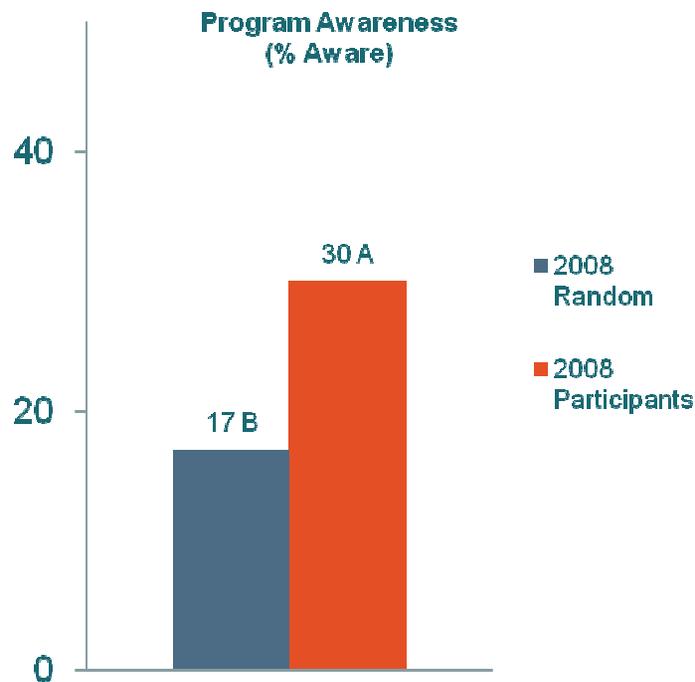
Awareness of Programs



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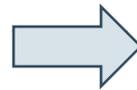


Consumers are now less likely than in 2005/2006 to say they are aware of programs available in New Jersey to encourage energy efficiency or clean power. A wide variety of sources are used to gain awareness of programs.



In 2006, 22% (n=800) were aware of these programs

In 2005, 20% (n=800) participated in programs



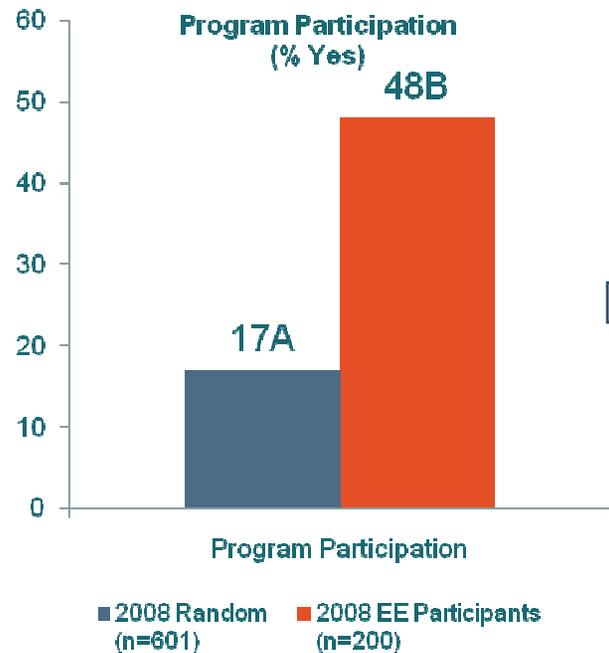
How Became Aware	2008 Random (n=601)	2008 Participants (n=200)
From friends or coworkers	15%	13%
With the monthly electricity bill	9	13
On product packages	12	7
From the electric company	10	10
Brochure mailed to your home	6	12
Brochures at retail stores	7	2
From the natural gas company	5	3
Information from sales people	2	7
Website/Internet	4	3
News	3	5
Other	12	8
DK/Ref	15	20

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

G1A. How did you become aware of this program?

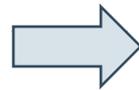
A/B denote significant differences.

Only about half of program participants say they participated in a New Jersey energy efficiency or renewable energy program, while 17% of consumers said they did. Most do not recall the name of the program.



In 2006, 3% (n=84) Participated in programs

In 2005, 5% (n=177) participated in programs



Program Names	2008 Random (n=18)	2008 Participants (n=29)
New Jersey ENERGY STAR promotions	11%	7%
New Jersey's Clean Energy Program	6	7
Change-A-Light program	11	0
Cool Advantage program	0	7
Clean Energy program	0	7
Warm Advantage program	0	3
Energy Star Lighting Promotions	6	0
CORE Incentive Program	6	0
Other	17	3
None	0	3
Don't Recall	39	52
Don't Know	11	14

G3. Have you participated in any of these programs?

G4. Do you remember the names of the programs in which you participated?

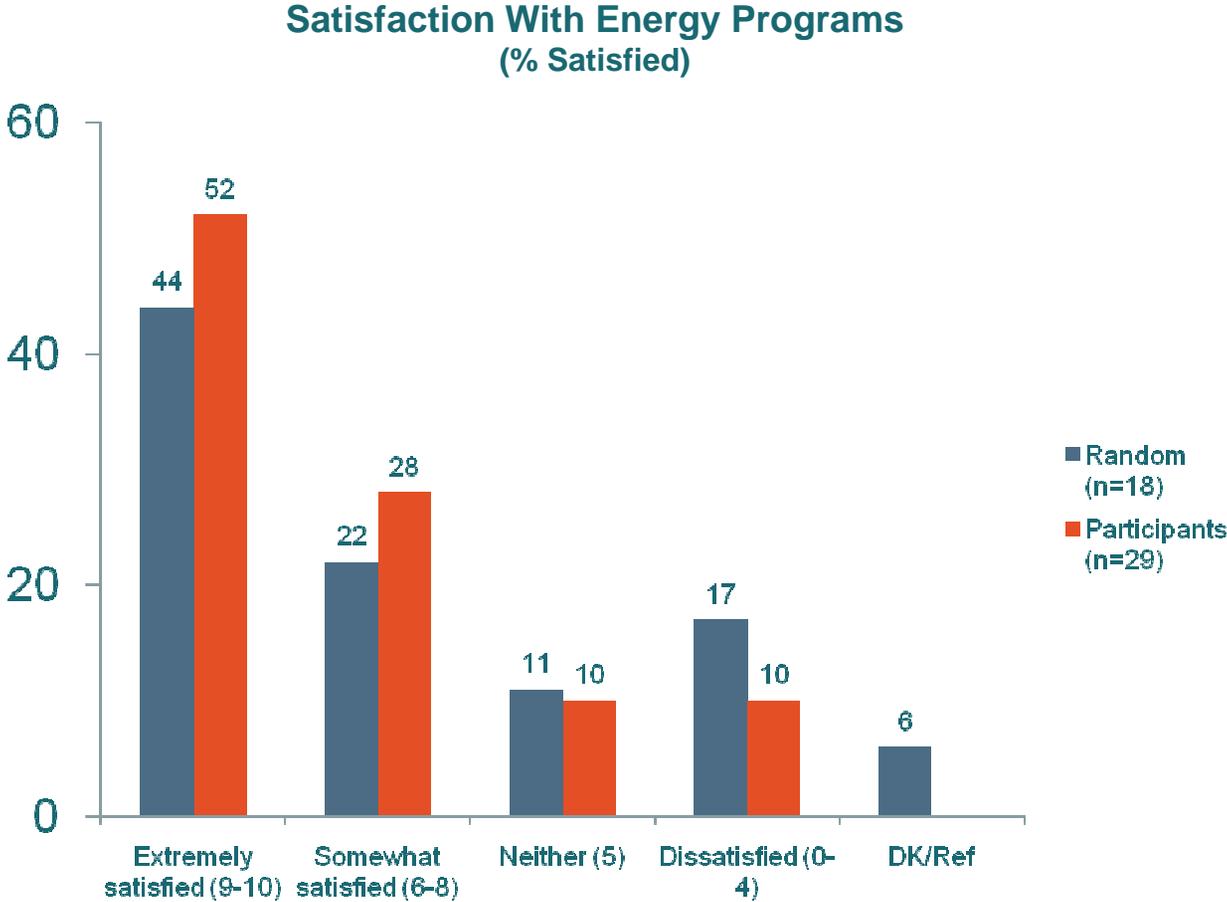
Those who say they participated in an energy efficiency or renewable energy programs are about equally likely to cite economic and environmental/altruistic reasons.

Reasons for participating in programs

	Claim to have participated (n=47)
Save me money	40%
Energy conservation	23
Received a rebate	19
Good for the environment	15
To support renewable energy	11
It made sense/right thing to do	11
Other	17
Don't know	2

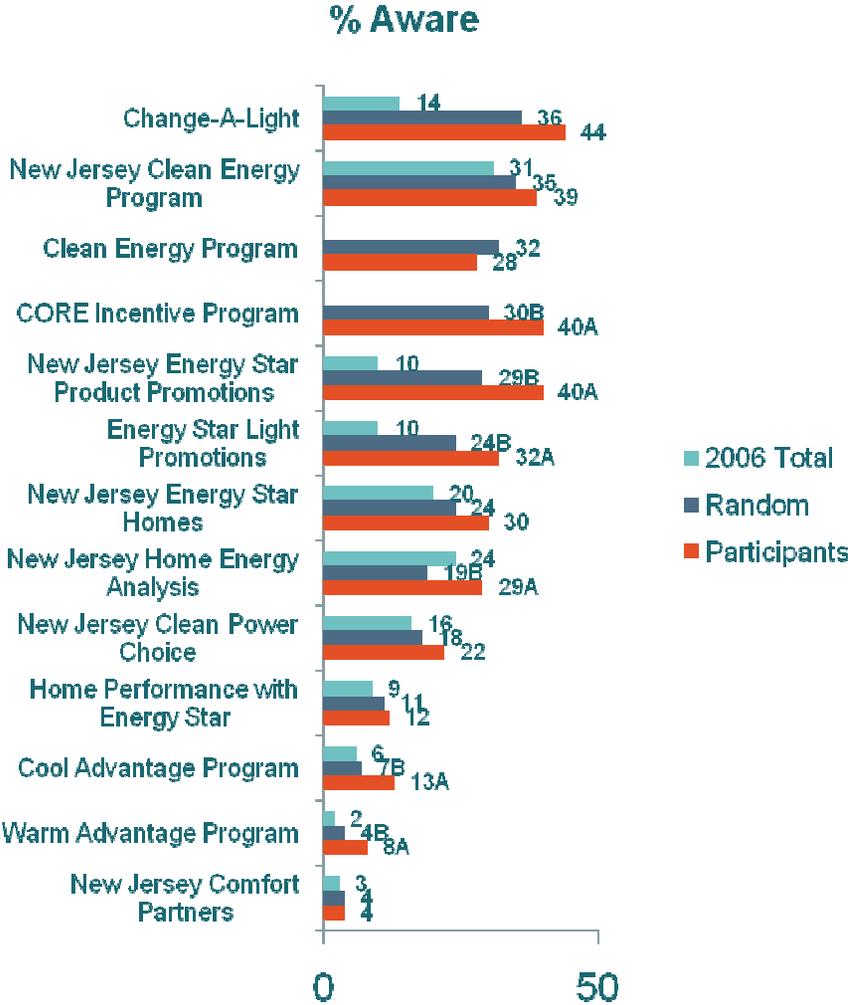
G4A. Why did you decide to participate in this/these program(s)? .

Of those who say they participated in a New Jersey energy efficiency or renewable energy program, about half are extremely satisfied with the program.



G4B. Using a zero to ten point scale, where zero means not satisfied at all and ten means extremely satisfied, how satisfied are you with this/these program(s)?.

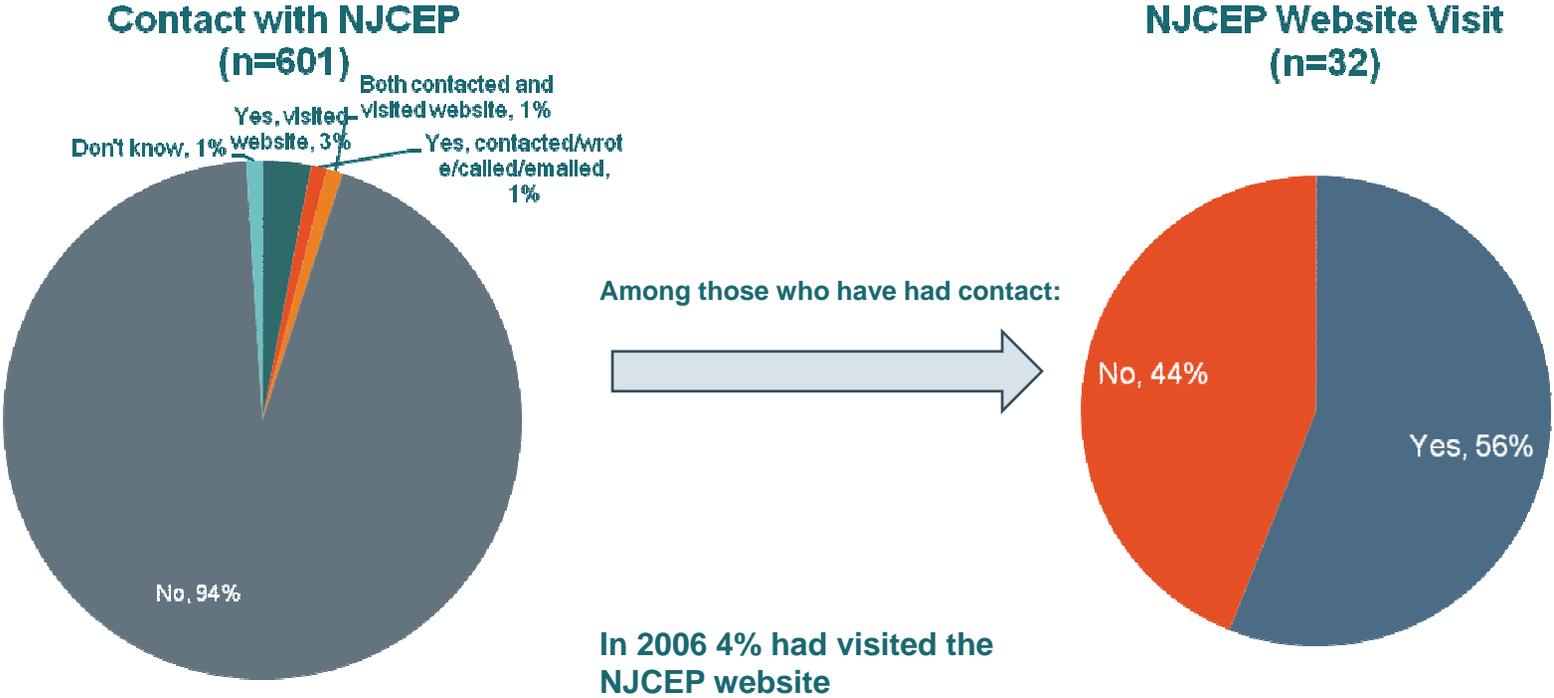
When asked about specific programs by name, awareness has generally gone up since 2006, and participants tend to be more aware than the random consumers.



G5A-G5M1. Have you heard of any of the following?

Few consumers say they have contacted New Jersey's Clean Energy Program. Of those who have, slightly more than half contacted the website.

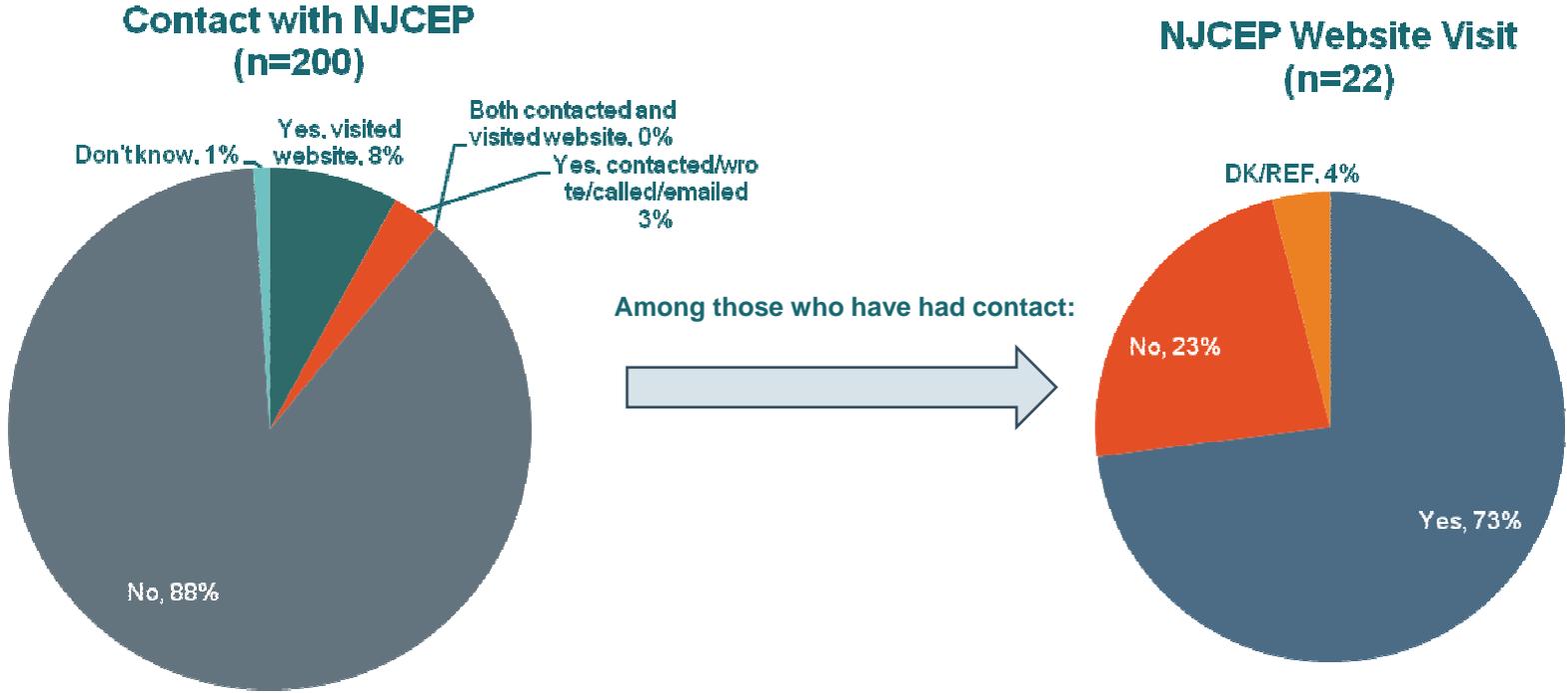
Random



G6B. Have you ever contacted the New Jersey's Clean Energy Program or visited their website?
G6C. Did you contact New Jersey's Clean Energy Program or visit their website during the past year?

A higher percentage of program participants say they have contacted NJCEP. Of those who have, about three-quarters visited the website.

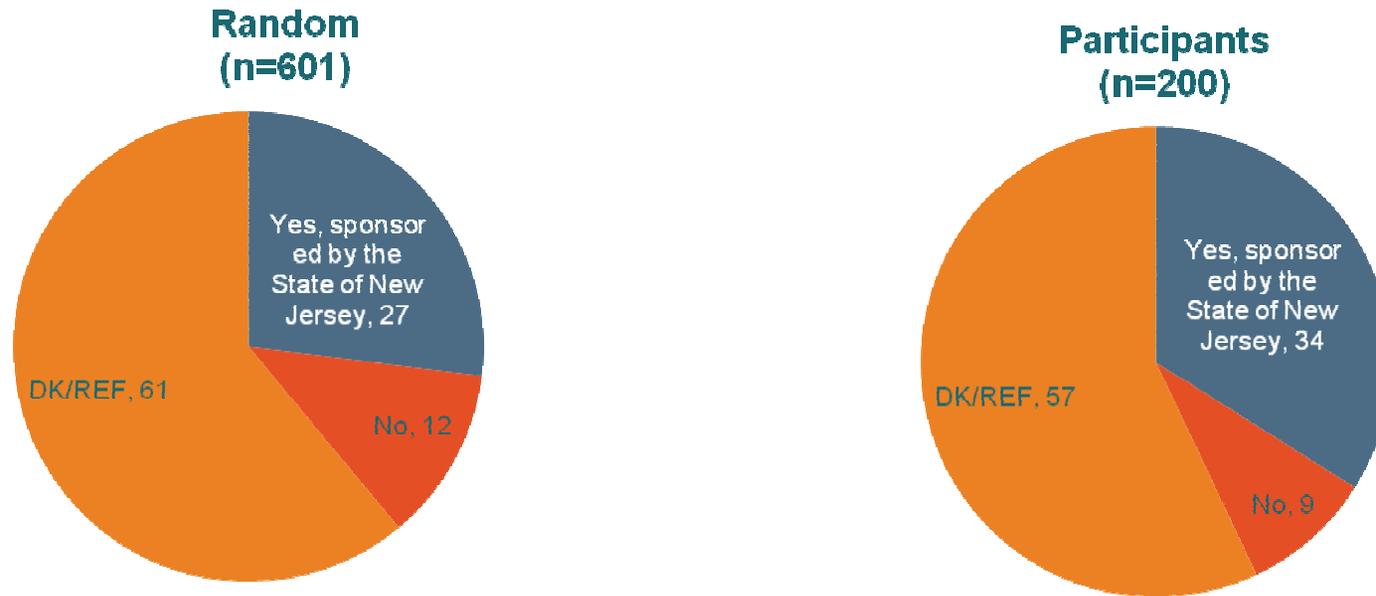
Participants



G6B. Have you ever contacted the New Jersey's Clean Energy Program or visited their website?
G6C. Did you contact New Jersey's Clean Energy Program or visit their website during the past year?

About one-quarter of consumers and one-third of program participants know that New Jersey's Clean Energy Program is sponsored by the State of New Jersey.

NJCEP Sponsorship



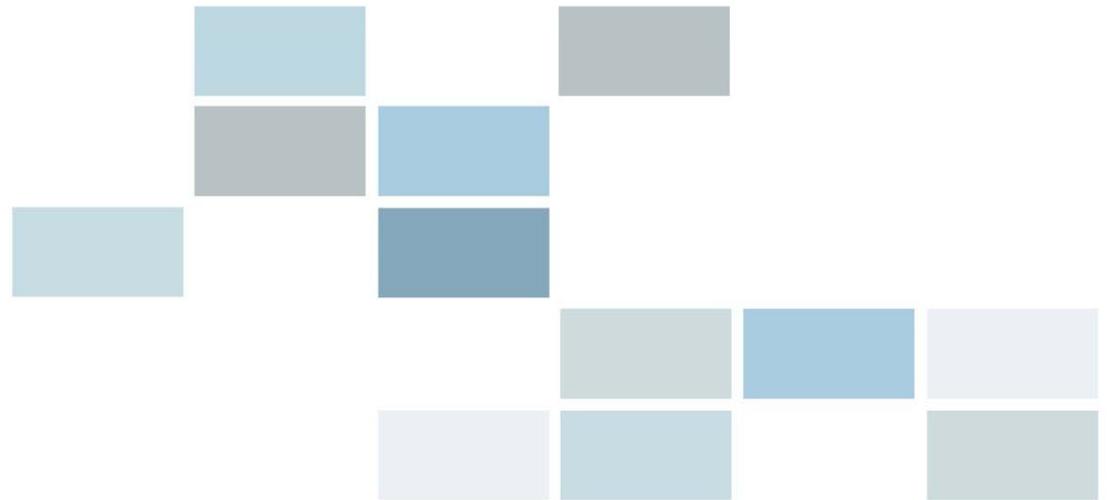
Note: In 2006 24% were aware that the State of New Jersey was the CEP sponsor

G7. To the best of your knowledge, is New Jersey's Clean Energy Program sponsored by the State of New Jersey, or not?

Specific Program Interest

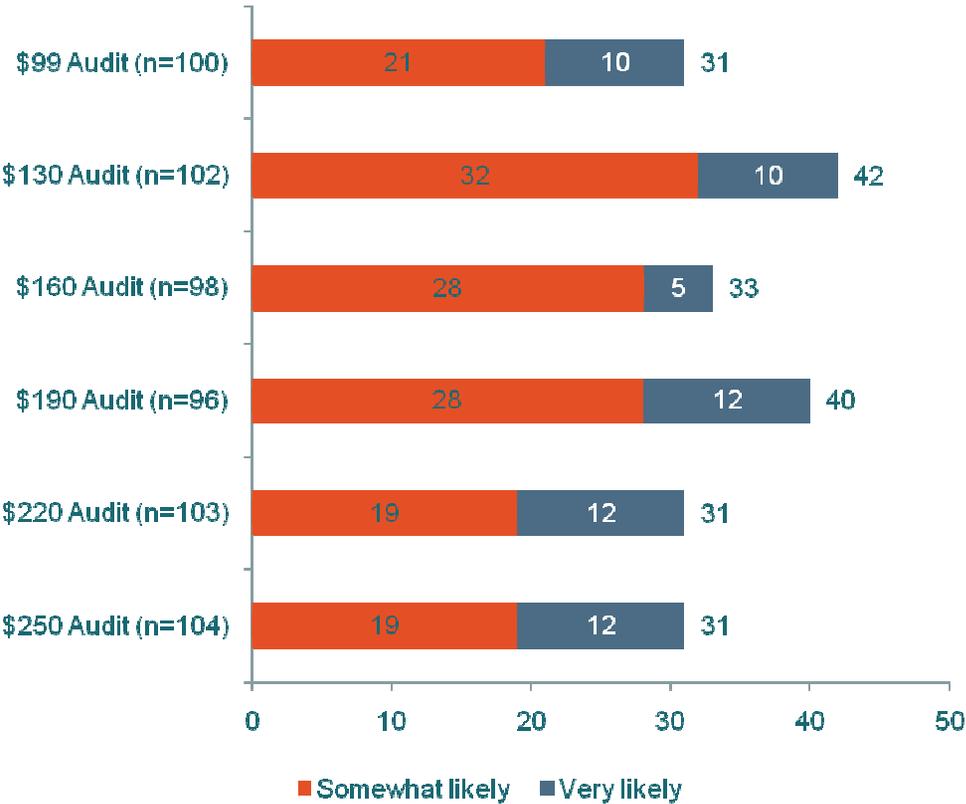


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Consumer interest in Home Performance with Energy Star changes surprisingly little as price varies.

Likelihood to Participate*
(% of Random Respondents)



Home Performance with Energy Star

The next program is the Home Performance with Energy Star Program. This comprehensive home improvement program can help reduce your home’s energy usage by up to 30%, create a more comfortable, healthy and safe living environment, and lessen the impact of global warming. Your home is professionally audited from top to bottom to identify the best opportunities to save energy and money.

Auditing and home improvement services are provided by accredited Building Performance Institute (BPI) contractors, who are specially trained and certified. The charge for the audit is [\$99-\$250], which is credited toward the cost of any work you may choose to have done that totals more than \$2,500.

*** Caution: Likelihood to Participate provides a good measure of relative interest in programs, but is not a forecast of actual behavior in the marketplace.**

P2A-P2BE. How likely would you be to participate in this program?

Program participants show more interest than the random consumers at higher price points up to \$220.



Home Performance with Energy Star

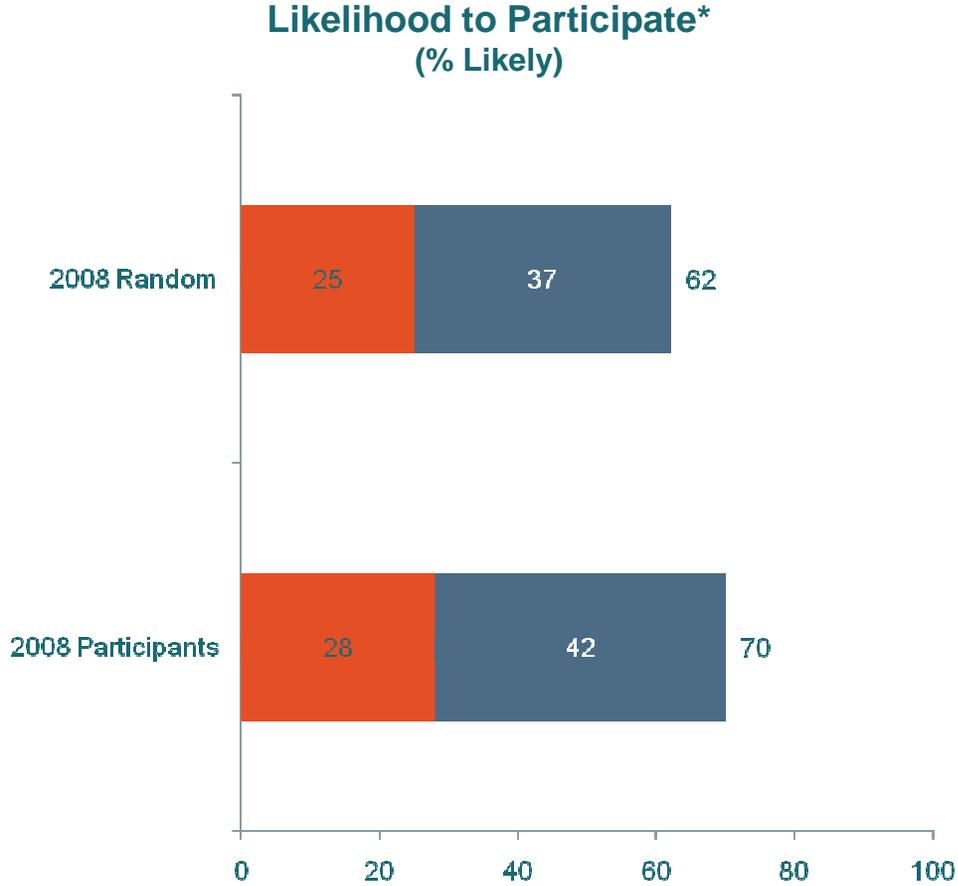
The next program is the Home Performance with Energy Star Program. This comprehensive home improvement program can help reduce your home’s energy usage by up to 30%, create a more comfortable, healthy and safe living environment, and lessen the impact of global warming. Your home is professionally audited from top to bottom to identify the best opportunities to save energy and money.

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*** Caution: Likelihood to Participate provides a good measure of relative interest in programs, but is not a forecast of actual behavior in the marketplace.**

P2A-P2BE. How likely would you be to participate in this program?

Six-in-ten consumers and seven-in-ten program participants say they would be likely to participate in the Energy Star Products program.



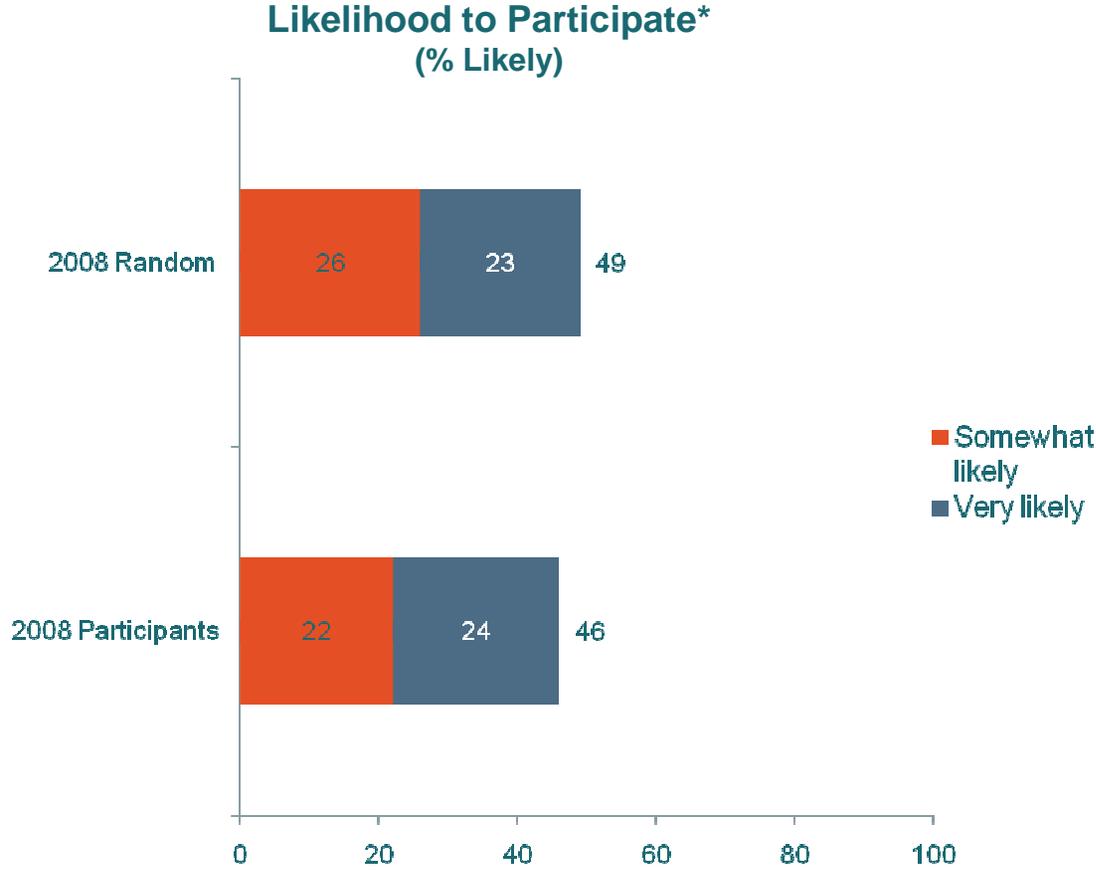
Energy Star Products

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

*** Caution: Likelihood to Participate provides a good measure of relative interest in programs, but is not a forecast of actual behavior in the marketplace.**

P2C. How likely would you be to participate in this program?

About half of both consumers and program participants say they would be likely to participate in the HVAC Program.



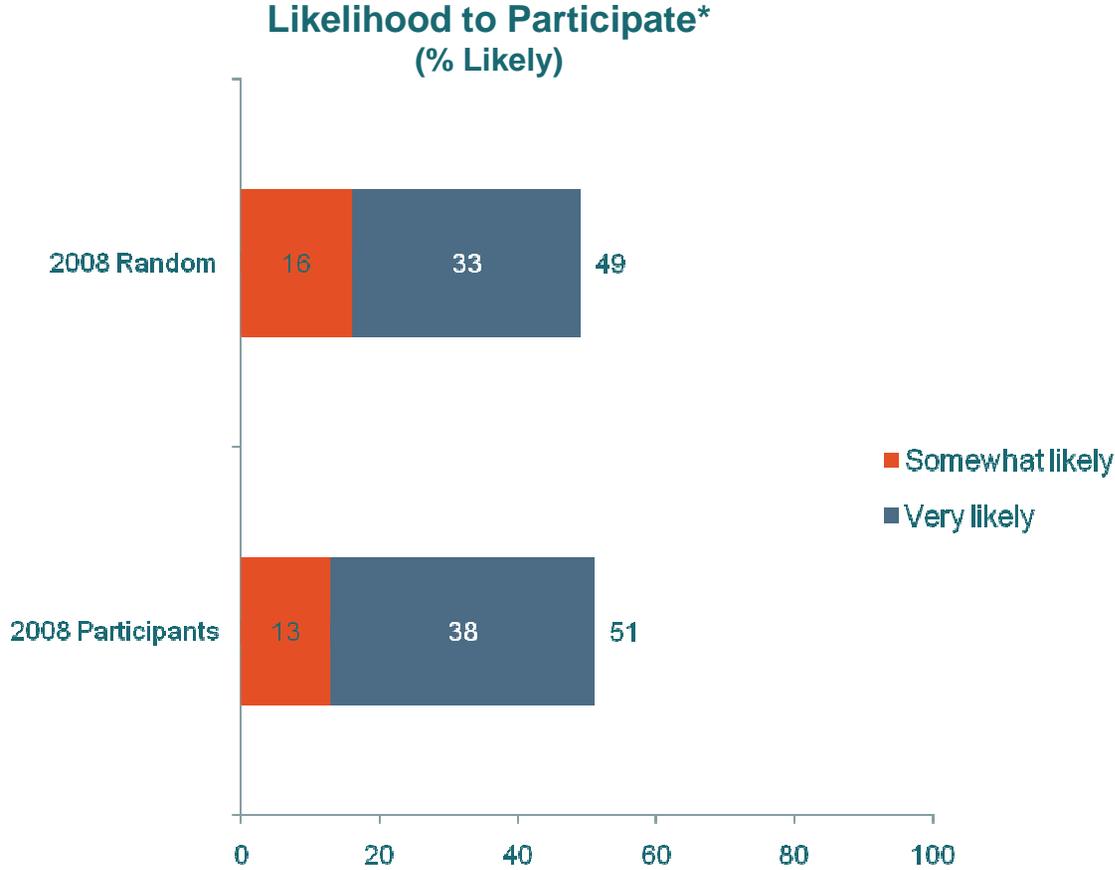
HVAC Program

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

*** Caution: Likelihood to Participate provides a good measure of relative interest in programs, but is not a forecast of actual behavior in the marketplace.**

P3. How likely would you be to participate in this program?

About half say they would be likely to participate in the Energy Star Homes Program (more say “very likely to participate” than for the HVAC Program).



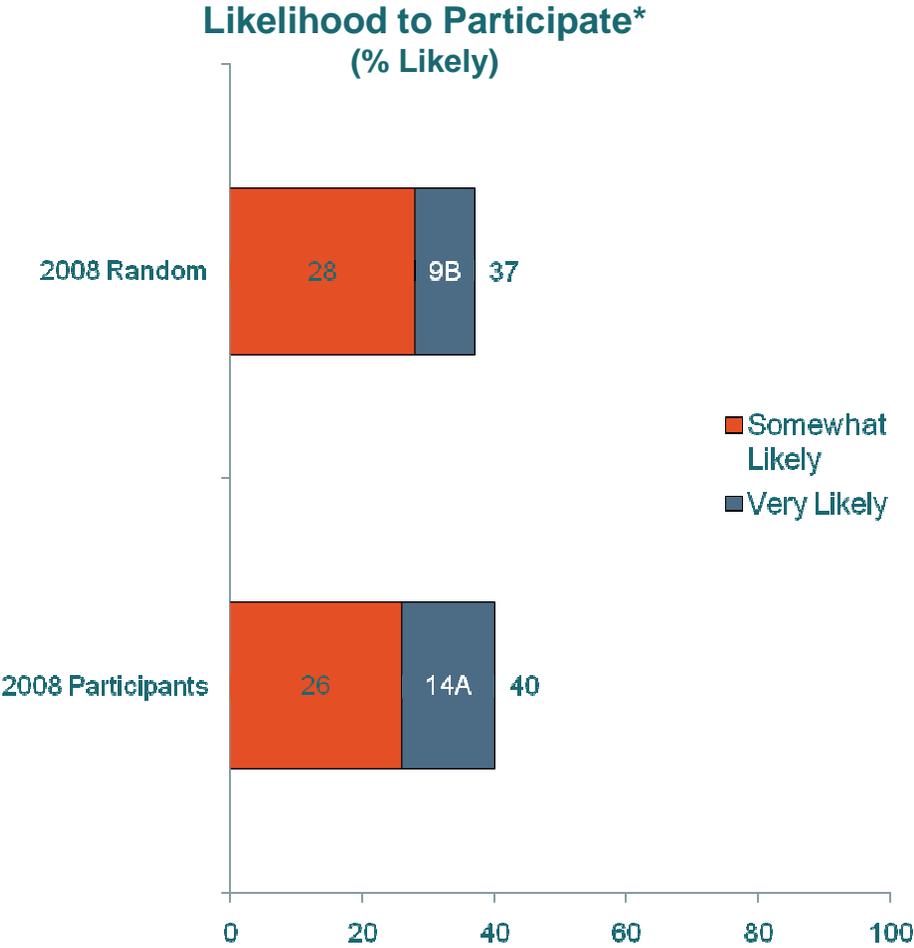
Energy Star Homes

The next program is the New Jersey ENERGY STAR Homes Program. If you’re building a new home, be sure to ask your builder for a New ENERGY STAR Home—built for superior energy performance, comfort, health and safety. Through the New Jersey Energy Star Homes program, these homes are independently tested and verified to use 15-35% less energy than conventional homes.

*** Caution: Likelihood to Participate provides a good measure of relative interest in programs, but is not a forecast of actual behavior in the marketplace.**

P4. How likely would you be to participate in this program?

About four-in-ten say they are likely to participate in the Clean Power Choice Program. Only about one-in-ten says “very likely.”



Clean Power Choice

The next program is the Clean Power Choice Program. By participating in this program, you can invest in the production of clean energy. For a \$10-\$15 more each month on your electricity bill, you’ll be investing in the generation of solar, wind and other renewable energy sources.

*** Caution: Likelihood to Participate provides a good measure of relative interest in programs, but is not a forecast of actual behavior in the marketplace.**

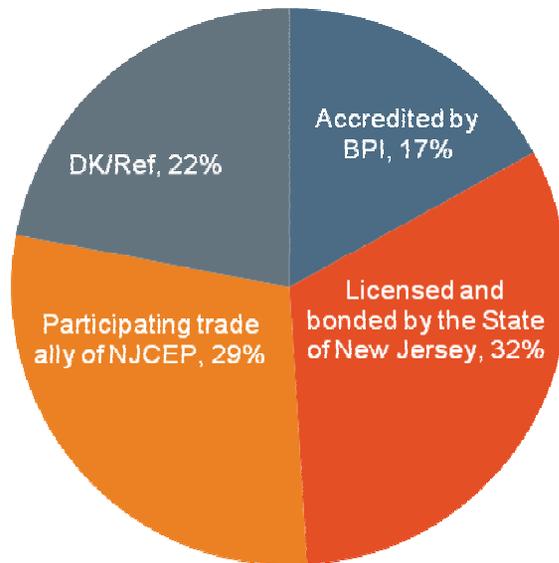
P5. How likely would you be to participate in this program?

A/B denote significant differences.

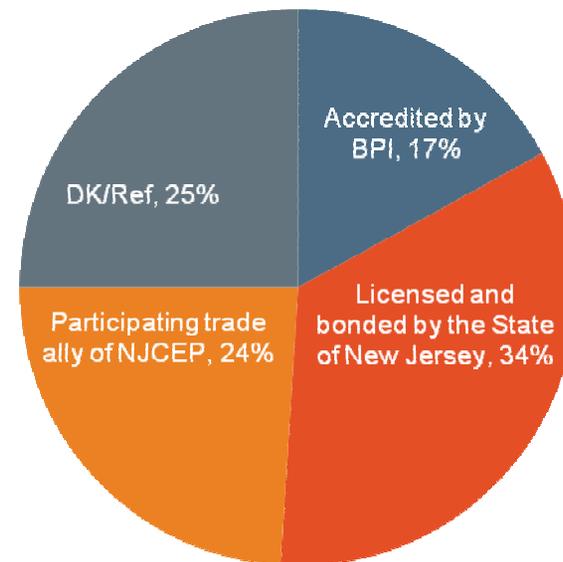
About one-third say that state licensing and bonding would do the most to increase their trust and confidence in a contractor. Almost as many in the random sample say that being a participating trade ally of NJCEP would do the most.

Ways to Increase Trust and Confidence in Contractor

**Random
(n=601)**

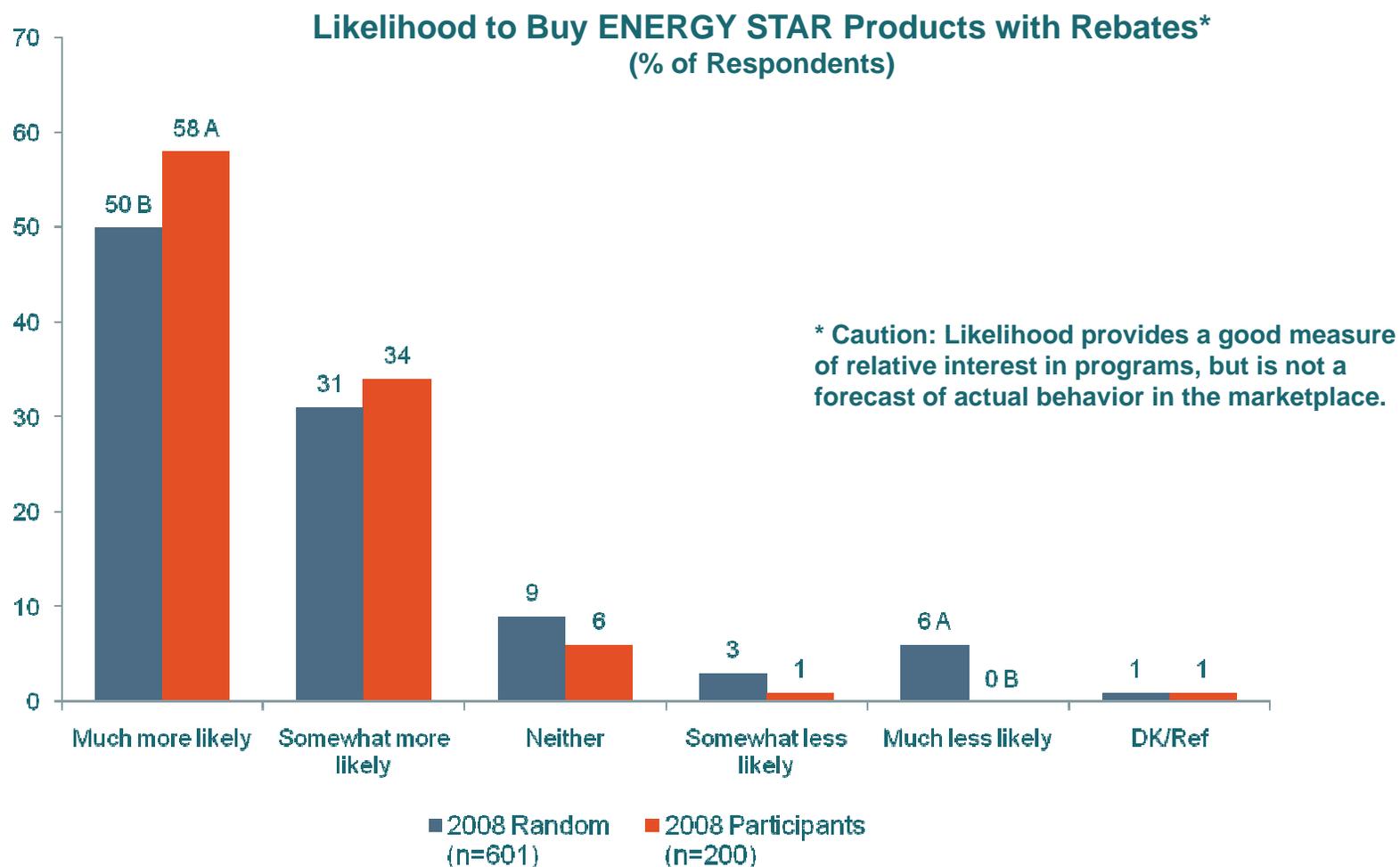


**Participants
(n=200)**



P6. Which of the following would do the most to increase your trust and confidence in a contractor you were considering working with to make energy-related improvements to your home?

Large majorities of consumers and program participants say that mail-in rebates would make them more likely to select Energy Star products.

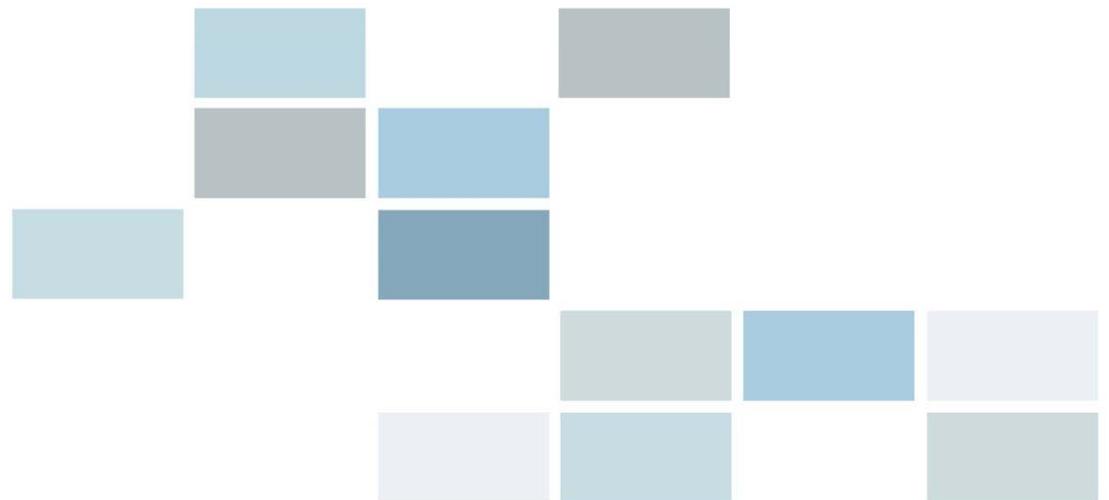


P7. If mail-in rebates were available on ENERGY STAR qualified appliances and lighting, valued at 5%-10% of the purchase price, would that make you more likely to select ENERGY STAR products? Would you be...

Information Seeking and Unaided Communications Awareness

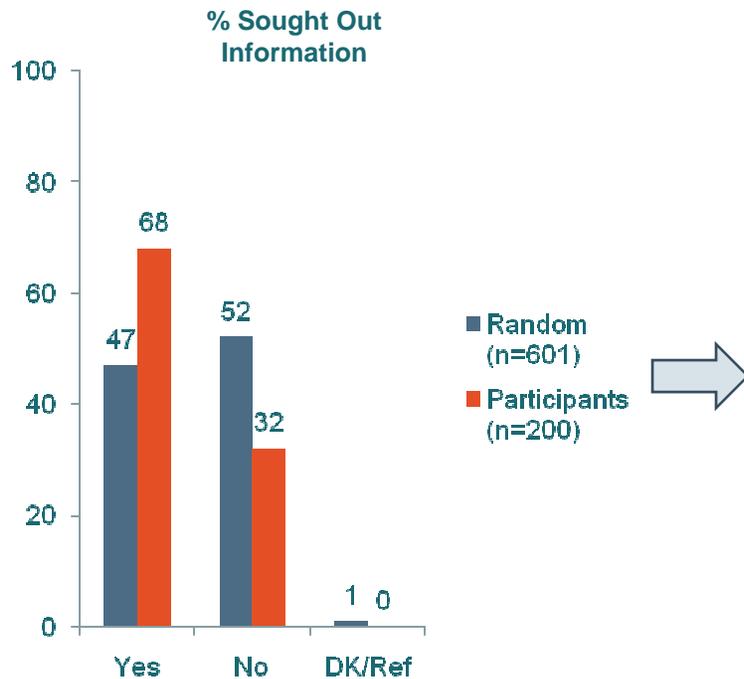


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Slightly less than half of consumers and about seven-in-ten program participants sought out information on energy saving products or services during the past year. This is an increase among consumers since 2005-2006. Most sought information on the web.

Sought Out Information on Energy Saving Products or Services



In 2006 39% (n=800) sought out information on energy saving products and services

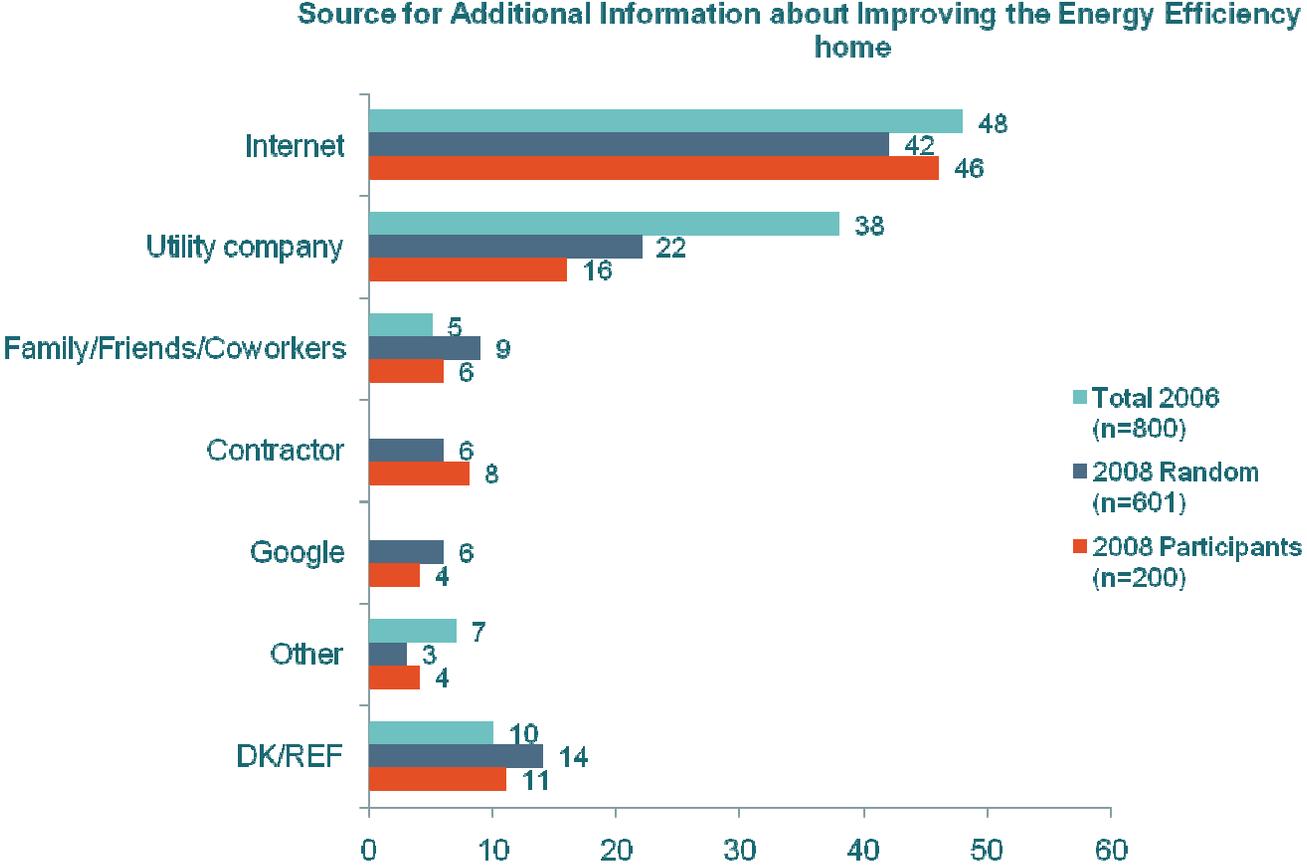
In 2005 22% sought out information on energy saving products and services

Information Source	2008 Random (n=281)	2008 Participants (n=135)
Website/Internet	48%	50%
Signs at retail stores	18 A	10 B
Information from salespeople	11	13
From friends, family, or other people	10	7
On product packages	8	7
Brochures at retail stores	7	8
Newspaper articles	4	4
Retail stores	4	3
Other	2B	7A
DK/Ref	2	3

IN1. During the past year, have you personally sought out information on energy saving products or services?
 IN2. Where did you look for this information?

Note: Mentions less than 4% not listed

The Internet is the predominant source of information for learning more about improving the energy efficiency of the home, followed by utilities.



Note: Mentions less than 2% not mentioned

IN3. If you were interested in learning more about **improving the energy efficiency of your home**, who would you contact or where would you go in order to research additional information?

The Internet and utility companies are the primary sources for contacting to sign up to have clean power or renewable energy supplied to one's home.

Source of Information

Information Source	Total 2005 (n=800)	Total 2006 (n=800)	2008 Random (n=281)	2008 Participants (n=135)
Internet/Google	47%	35%	35%	34%
Utility company	39	44	29B	38A
Family/Friends/Coworker	4	4	5	5
Contractor	NA	NA	3	6
State government	9	5	3	2
Other	8	7	4	4
No/None/Nothing	NA	NA	3	2
Don't know/Refused	16	18	20A	13B

Note: Mentions less than 2% not listed

IN4. If you were interested in **signing up to have clean power or renewable energy supplied to your home**, who would you contact or where would you go in order to research additional information?

Primary trusted information sources are consumer advocates, environmental organizations, and the U.S. Environmental Protection Agency.

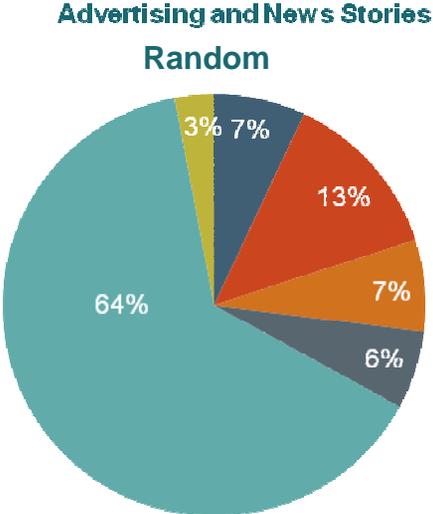
Most Trusted Information Source

Most Trusted Information Source	Total 2006 (n=800)	2008 Random (n=529)	2008 Participants (n=174)
Consumer advocates	21%	14%	18%
Environmental organizations	22	14	14
U.S. Environmental Protection Agency	NA	14	12
The New Jersey Clean Energy Program	8	8	11
Your electric utility	13	9	6
U.S. Department of Energy	NA	8A	3B
The Board of Public Utilities (BPU)	NA	6	6
TV News	6	5	3
Don't know/Refused	6	10	12

Note: Mentions less than 5% not listed

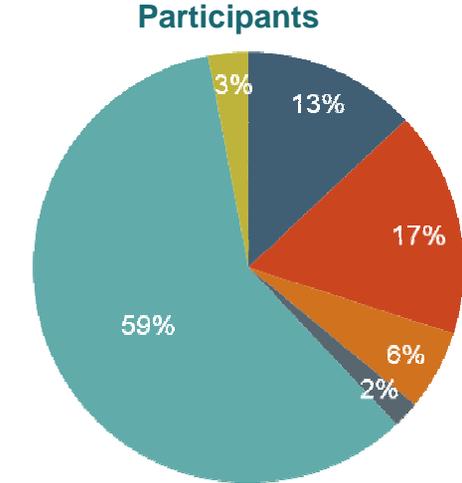
IN5. In your opinion, which of the following is the most trusted source of information when it comes to clean power or renewable energy?

One-third of consumers (up from 22% in 2006) and two-fifths of participants recall reading, seeing, or hearing about a clean power, renewable energy, or energy efficiency program being made available.



In 2006, 22% (n=800) recall advertising and news stories

Among those who recall:



- Yes, recall advertising
- Yes, recall news story
- Yes, recall both
- Yes, recall but unsure
- No, do not recall ads or news stories
- Don't know

What do you recall?

Advertising and Media Coverage	2008 Random (n=160)	2008 Participants (n=71)
About wind power/windmills	14%	16%
About needing alternative energy	14	10
Can't remember specifics	16A	6B
About solar power	11	13
Energy efficient products	7	11
Cost	4	10
To go green	4	4
To conserve power	4	4
About the programs	4	6
Clean air/pollution	3	4
Other	11	7
No/none/nothing	4	11
Don't know/Refused	15	16

T1. During the past few months, do you recall reading, seeing, or hearing about a clean power, renewable energy, or energy efficiency program being made available to you?...
 T2. What, specifically, do you recall about the clean power, renewable energy, or energy efficiency program being offered in this advertising or media coverage?

Of those who do recall advertising or media coverage about energy efficiency programs, most recall the source as television or newspaper.

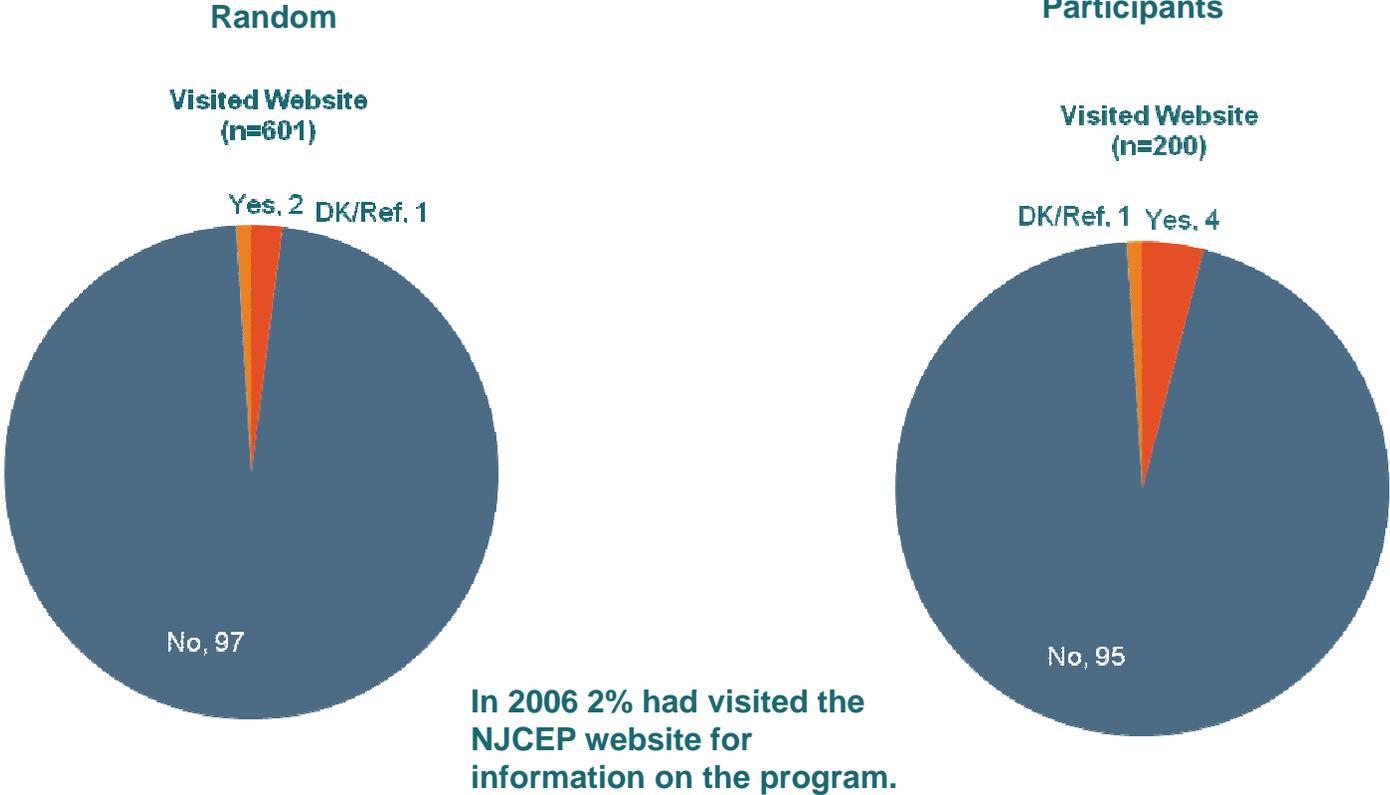
Where did you read, see or hear this advertising or media coverage?

Media Coverage Source	Total 2006 (n=137)	2008 Random (n=160)	2008 Participants (n=71)
Television	42%	46% A	31% B
Newspaper	46	41	38
Magazines	8	16 A	6 B
Internet/website	NA	9	11
Radio	12	11	7
Bill insert	15	8	13
Direct mail	5	2 B	8 A
Other	9	3	6
Don't know/Refused	4	1	4

T3. Where did you read, see or hear this advertising or media coverage?

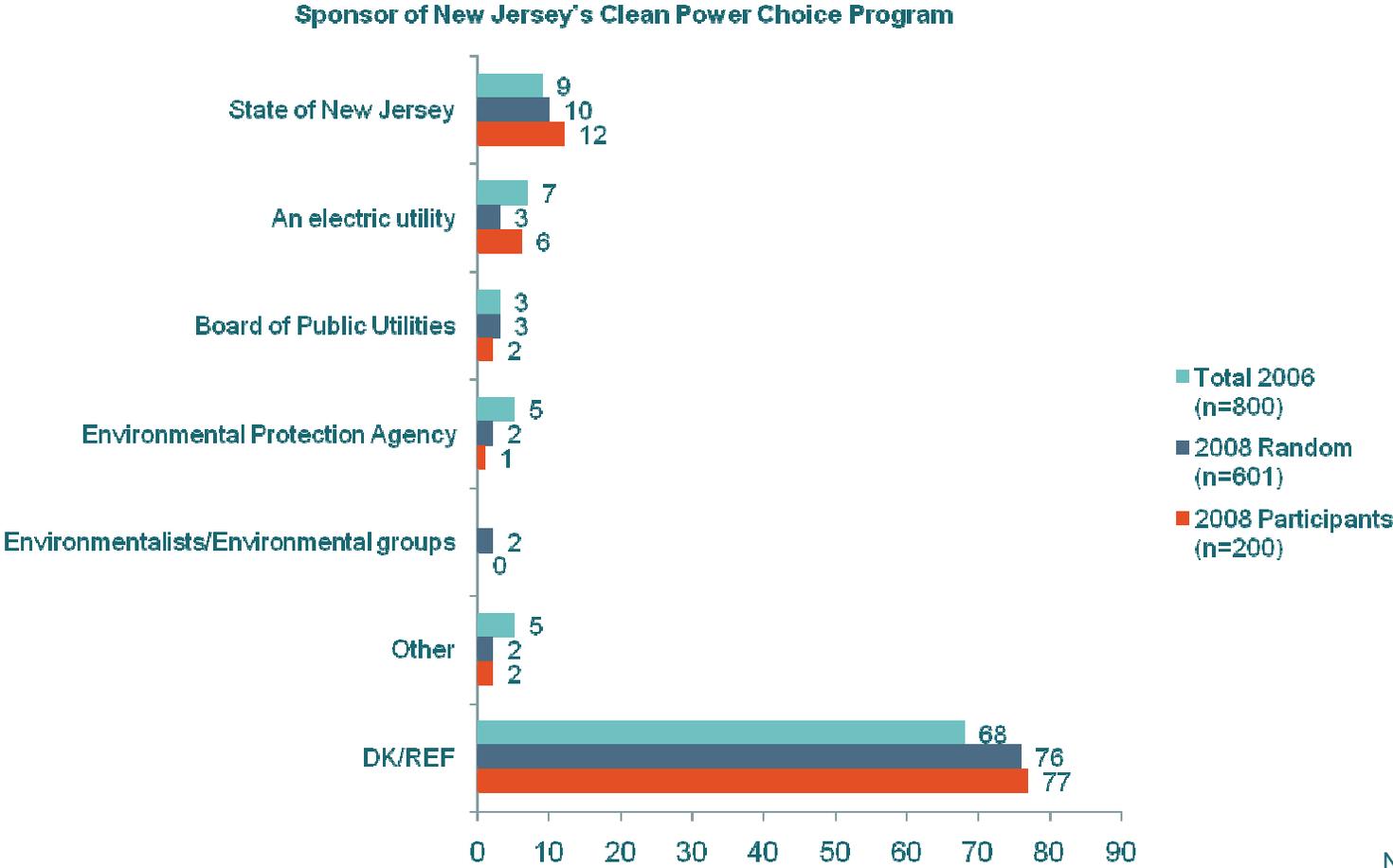
Note: Mentions
less than 4% not
listed

Two percent (2%) of consumers and 4% of program participants have visited the Clean Power Choice website. The consumer number is the same as in 2006.



T16. Have you visited the special Clean Power Choice website in order to find information about New Jersey's Clean Power Choice Program?

Three-quarters of consumers and participants do not know who sponsors the Clean Power Choice Program, while one-in-ten say it is the State of New Jersey.



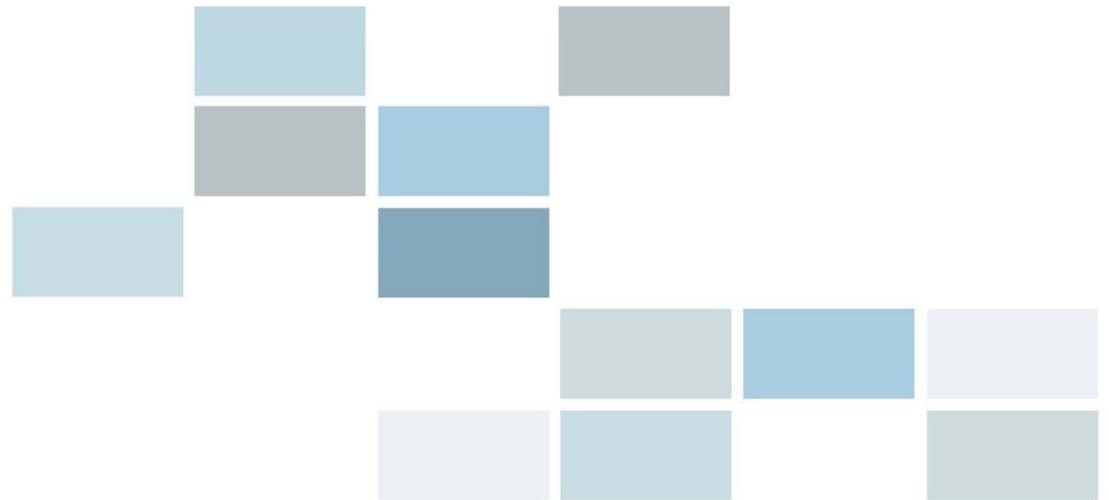
Note: Mentions less than 2% not mentioned

T21. To the best of your knowledge, who is the sponsor of New Jersey's Clean Power Choice program? What organization or group is behind it?

Demographics



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Respondents: Electric and Natural Gas Providers

Electric Companies	2008 Random (n=595)	2008 Participants (n=196)
Atlantic City Electric	15%	13%
Jersey Central Power & Light	29	31
Orange Rockland Electric	2	0
PSE & G	48	50
Other	3	4
Don't know/Refused	3	2

Natural Gas Companies	2008 Random (n=237)	2008 Participants (n=92)
Elizabethtown Gas	14%	6%
New Jersey Natural Gas	34	38
PSE & G	19	25
South Jersey Gas	25	23
Other	3	4
Don't know/Refused	6	2

Respondents: Gender and Education

QC2: Gender	2008 Random (n=601)	2008 Participants (n=200)
Male	47%	50%
Female	53	50%

D1: Education	2008 Random (n=601)	2008 Participants (n=200)
High school incomplete	2%	0%
High school complete	23A	14B
Vocational/Technician school	3	4
Some college	13	16
Junior college graduate	7	5
4-year college graduate	28	29
Graduate work	23B	31A
Don't know/Refused	1	1

Respondents: Age and Income

D2: Age	2008 Random (n=628)	2008 Participants (n=146)
18-30	3%	1%
31-40	11	10
41-50	18	17
51-55	14	16
56-60	14	14
61-65	10	12
66 +	25	26

D3: Income	2008 Random (n=601)	2008 Participants (n=200)
Under \$25,000	8%	4%
\$25,000-\$49,999	13	11
\$50,000-\$74,999	16	8
\$75,000-\$99,999	14	12
\$100,000-\$124,999	12	16
\$125,000 or more	18B	28A
Don't know/Refused	20	22

Respondents: Average Monthly Energy Bills and Own/Rent

D5: Average Electric Bill	2008 Random (n=589)	2008 Participants (n=198)
\$0-\$100	12%	8
\$101-\$200	29	27
\$201-\$250	8	11
\$251-\$300	16	19
\$301-\$350	4B	9A
\$351-\$400	8	8
\$401 or more	11	10
DK/REF	12	8

D7: Own or Rent	2008 Random (n=601)	2008 Participants (n=200)
Own	83% B	97A
Rent	14A	1B
Live rent free	0	
Don't know	3	2