



Prepared for NEEA:
Corinne McCarthy, Sr. Manager, MRE
Stephanie Baker, Program Manager, Super-
Efficient Dryers

Prepared by ArrowG Consulting:
Jennifer Lynch, Qualitative Research Consultant
10626 Lakecove Way
Knoxville, TN 37922
(432)580-9733



Exploring The Consumer Value Proposition For Super-Efficient Dryer

Qualitative Research Report
Report E17-350
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Background, Objectives + Research Design

Background

NEEA's Super-Efficient Dryers initiative team has a number of market interventions aimed at removing barriers that enable manufacturers and retailers to accelerate the rate of adoption of SEDs in the Northwest region (OR, WA, ID & MT).

NEEA's Market Transformation theory also suggests that it will be important to design interventions that overcome the adoption barrier of low consumer awareness and interest in Super-Efficient Dryers (SED).

To address this barrier, NEEA's SED initiative team would like to develop a consumer centric value proposition for Super Efficient Dryers that can be used as the basis for consumer messaging by retailers, manufacturers and utility partners.

The purpose of this study is to gather the information necessary to create and test consumer-centric value propositions.



Objectives

BUSINESS OBJECTIVE:

Create a value proposition statement that can be used as the basis for creating consumer centric communications designed to raise awareness and interest in SEDs.

RESEARCH OBJECTIVES:

To generate insights regarding the purchase process for dryers, including:

- Triggers
- Hierarchy of needs
- Influencers on purchase decision

To gain an in-depth understanding of benefits of SEDs that resonate most with potential SED purchasers (both EEB and NEB), including:

- The most compelling consumer language that articulates the various benefits of SEDs
- The value of these benefits relative to one another
- The value of these benefits relative to the factors they currently consider when purchasing a dryer

Research Design

In order to meet NEEA's objectives, Arrow G Consulting recommended conducting a 2-phase qualitative research design

Phase I

November 16 – 21, 2016



- Project kick-off meeting
- 5-day, online blog among recent dryer purchasers and intenders

Phase II

December 5 – 9, 2016



- 2-hour concept training session + 6-hour concept writing workshop at NEEA offices
- Iterative online board to refine concept communication with consumers

Respondents

In each phase, we recruited recent purchasers and intenders to participate:

- Recent Purchasers purchased a clothes dryer within the past 2 years
- Intenders plan to purchase within the next 6 months
- All recruits were equally represented across Idaho, Montana, Oregon and Washington

Phase 1: Purchasers	14
Phase 1: Intenders	10
Phase 2: Purchasers	10
Phase 2: Intenders	8
Total	42

* Recruitment specifications included in the screener found in the appendix of the report

Executive Summary

As the Dryer Turns: 5 Things You Should Know

1

While shopping **consumers consider many factors** but size/capacity, brand, energy efficiency and setting options are most top of mind.

2

Energy Efficiency (EE) is important to consumers. However, consumers aren't aligned on its meaning, and they have a number of misconceptions about it.

3

The **ENERGY STAR®** designation is synonymous with “energy efficient,” -- many believe that most dryers are ENERGY STAR®, and that they have been in the marketplace for some time.

4

Concepts E (Energy Star) and T2 (Better Dryer) hold the most potential for NEEA as a value proposition statement.

5

The Path-to-Purchase involves a lot of research. ***The most opportunistic way to influence the dryer purchase is via on-line messaging, not in store.***



While shopping **consumers consider many factors**, but size/capacity, brand, energy efficiency and setting options are most top of mind.

- Almost all research for a dryer happens ONLINE.
- Consumers are overwhelmed at options and salespeople are not seen as helpful.
- While shoppers are not brand loyal to specific brands, a familiar brand name communicates good quality and reliability.



FOR YOUR CONSIDERATION...

- Quantitative testing could be done to understand the 'ranking' of the four factors in terms of desirability as well as each factor's price value.
- Ensure the factors are a priority for communication on creative elements.

2

Energy Efficiency (EE) is important to consumers. However, consumers aren't aligned on its meaning, and they have a number of misconceptions about it.

- Energy Efficiency doesn't have just one, universal meaning and consumers are looking for help in defining EE and understanding it.
- Consumers find it difficult to understand what makes one appliance more energy efficient than another.
- Consumers tend to define EE into two themes: Saving Money and Helping (or not hurting) the Environment.



FOR YOUR CONSIDERATION...

- Ensure communication about Energy Efficiency is clear and easy for consumers to understand.
- Reinforce the existing 'feel good' emotion consumers have about buying EE products to create a 'tipping point' for shoppers to help them decide.
- Do not rely on the in-store shopping experience to convince consumers to make an EE choice. Rather, place communication throughout the path to purchase, ***especially online***, so consumers hear about EE early and often.



The **ENERGY STAR®** designation is synonymous with “energy efficient,” -- many believe most dryers are ENERGY STAR®, and that they have been in the marketplace for some time.

- ENERGY STAR® has been point of market entry for consumers and many assume most dryers are ENERGY STAR®
 - They also believe that those dryers represent the basic level of energy efficiency in the dryer category.
- Consumers are unaware of any current ENERGY STAR® ‘levels’ but would love to see a ‘next level’ of ENERGY STAR® designation.



FOR YOUR CONSIDERATION...

- Partner with Energy Star to build clear, consistent message regarding the various ENERGY STAR® levels to help consumers quickly understand.
- Work with manufacturers to implement EE communication to help them differentiate their dryers from each other and from their competitors. This would create a additional sense of ‘choice’ within the category which is currently seen as undifferentiated.

4

Concepts E (ENERGY STAR®) and T2 (Better Dryer) hold the most potential for NEEA as a value proposition statement.

- Concept E (ENERGY STAR®) is the easiest for consumers to relate to as they are already familiar with the Energy Star rating.
- Concept T2 (Better Dryer) offers new innovation and strong proof points.
- We hypothesize that Concept V (Vent-less) is best fitted for a targeted audience—potentially those with little space or new home builds who would be most interested in the location flexibility.
- Concept L (Living Values) is appealing however would serve best as an executional idea, such as a creative campaign (“*Future Generations*”).



FOR YOUR CONSIDERATION...

- Ensure the name of the next level of Energy Star is clear to consumers so they can easily locate it among the sea of dryers.
- Consider using the proof points of concept T2 (Better Dryer) with the benefit of concept E (ENERGY STAR®)
- Leverage Concepts V + L with targeted audiences and/or in creative executions.

5

The Path-to-Purchase involves a lot of research. *The most opportunistic way to influence the dryer purchase is via on-line messaging, not in store.*

- Consumers feel a degree of stress and responsibility to do a thorough job researching a dryer purchase.
- Consumers leverage online resources throughout the P-to-P process as it is easily accessible.
- As a result of this online research, many consumers have narrowed their choices *before they get to the store.*
- Salespeople are not seen as helpful and few even discuss EE with consumers.



FOR YOUR CONSIDERATION...

- Ensure multiple touchpoints with EE messaging *BEFORE* consumers even arrive in-store.
- Create easy message tracks for salespeople to include EE in their conversations with consumers.

A Little About Study Respondents

* These are not pictures of actual consumers.

Respondents have a strong connection to, and appreciation of, the environment

- Respondents in this part of the country are outdoorsy and have a connection to the environment that is a part of their lifestyle
- The best times of day are the quieter times--often spent alone or relaxing with family members. Usually at the beginning or end of each day.



“The best part of my day is when I am in quietness after I get up and I can focus on how I want my day. I love the stillness in the morning and that time gives me energy and focus to conquer the day.”

The over-arching concern of respondents is for future generations

Many are concerned about the state of our country and our future-- particularly those with children who worry what kind of world they will inherit.

I'm worried about the future for my children in this world. I instill values in them and let them know character is the most important thing.

I worry about what sort of world I'm raising my son in. It is a lot scarier than when I was a kid. I just want our family to be safe."



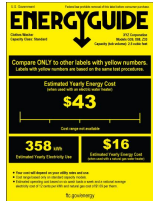
Some Common Threads (about purchasing dryers)

Top of mind considerations were consistent among respondents



SIZE / CAPACITY: It has to be able to accommodate my largest loads

SETTING OPTIONS: I need to be able to use it with a variety of fabrics



ENERGY EFFICIENCY: I save money and feel good when it's efficient

REPUTABLE BRAND: I trust it will be high quality, reliable and durable



Additional features mentioned that are a priority for some: quietness, uses the latest technology and extended warranties.

Respondents aren't necessarily brand loyal

- Ultimately, consumers want a RELIABLE machine with a good price.
- Reliability is often related directly to brand.
- Consumers are **not necessarily brand loyal**, but they do narrow their consideration set by brand.



The first thing will be looking for is that it has a large capacity. I'll also be looking for the brands that I trust.

I am looking for a dryer first of all, that is a reputable brand. If it is reputable, its less likely to have issues.

I was looking for a dryer that was energy efficient, name brand and didn't cost an arm and a leg.

My first step is to figure out what brand I want.



Matching sets are important to some, but not all, respondents

There are many who don't particularly care about a matching set. But, for those who do:

- They typically want them to match for aesthetic purposes as they are the same color, similar style/look, similar dimensions.
- A matching set is especially important if the set is visible to guests in the home.
- Many say they get a better “deal” when they purchase the set versus only one.
- Consumers sometimes say sets are “meant to work as a team” (designed to work together).
- In some cases, the purchase of a washer may lead to the purchase of a dryer so the set does match



I've noticed that there are often washer/dryer combo deals at retailers. I also think it is good aesthetically to have a matching washer/dryer as well.

While not required, matching washer and dryer look nice and theoretically are designed to be used together, so your workflow should be simple. Similar controls are a big consideration for making it easy to work with.

Perceptions about Energy Efficiency

Respondents don't know what they don't know about Energy Efficiency

- Consumers want energy efficiency and they actively seek out EE products.
- But energy efficiency is misunderstood. They are unsure of what it means, especially when related to dryers and drying times.
- The benefits are 'higher order' and less tangible than products in other categories.

Drying wet clothes quicker means it is energy efficient.

The only things we saw were a couple of green labels on a couple of the dryers, and some HE cycles on the labels. They did nothing to highlight it or explain how it works or why it would be good for us.



Respondents believe that ENERGY STAR® is synonymous with Energy Efficiency

However, there is opportunity to leverage the ENERGY STAR® equity is limited because respondents don't really understand Energy Star

- Their only real touchpoint with ENERGY STAR® is the “sticker” (they say it is yellow) seen on appliances at the store.
- Salespeople do not talk to them about energy efficiency.
- It is difficult for them to understand which dryers are ‘more’ EE than others.
- They are unaware of any ENERGY STAR® “levels” though they do believe that standards change over time as technology improves.



*** Consumers believe ENERGY STAR® and the Energy Guide are the same thing.**

On most dryers you will see the little yellow energy use label that oftentimes will tell you if it is energy star qualified or not. I saw them in many places while I was shopping.

There is confusion regarding the relationship between Energy Efficiency and drying times

Consumers desire shorter drying times as this would mean they could potentially save time overall (doing laundry).

- However, they do not seem to understand that shorter drying times means a higher heat is needed—and therefore, requires more energy.
- Very few consumers are aware that EE dryers conserve energy and may actually need LONGER dry cycles



The larger the load, the wetter the clothes and the longer it takes to dry. The longer the dryer is in use, the more electricity it uses and the more it costs me.

Respondents associate moisture sensors with Energy Efficiency

They use it as a way to identify EE dryers when shopping

- It is one feature that is visible to them about energy efficiency (other than the Energy Star rating).
- They equate the two because the dryer stops when it recognizes that the clothes are dry.
- Many believe this happens before the cycle has ended (meaning less drying time and more energy savings).



This feature allows the dryer to shut itself off once the clothes are dry...saving you money and a longer life of clothes.

The Benefits of Energy Efficiency

Respondents identify with some very **TANGIBLE** benefits of Energy Efficiency

When consumers buy energy efficient products, they assume they will save money and help preserve the environment



Saving Money

- They believe they will save money on their energy bills with the purchase of EE appliances.

I want to save money and be kind to the environment.



Helping the Environment

- By lowering their energy usage, consumers feel good about "doing their part" to lessen their footprint on the environment.

They also express **EMOTIONAL** benefits of Energy Efficiency

Consumers associate peace of mind, happiness and relief with purchasing energy efficient products

PEACE OF MIND



They are saving money AND it is better for the environment.

HAPPY



They are doing the right thing for the environment/
Mother Earth.

RELIEVED



Due to saving money!

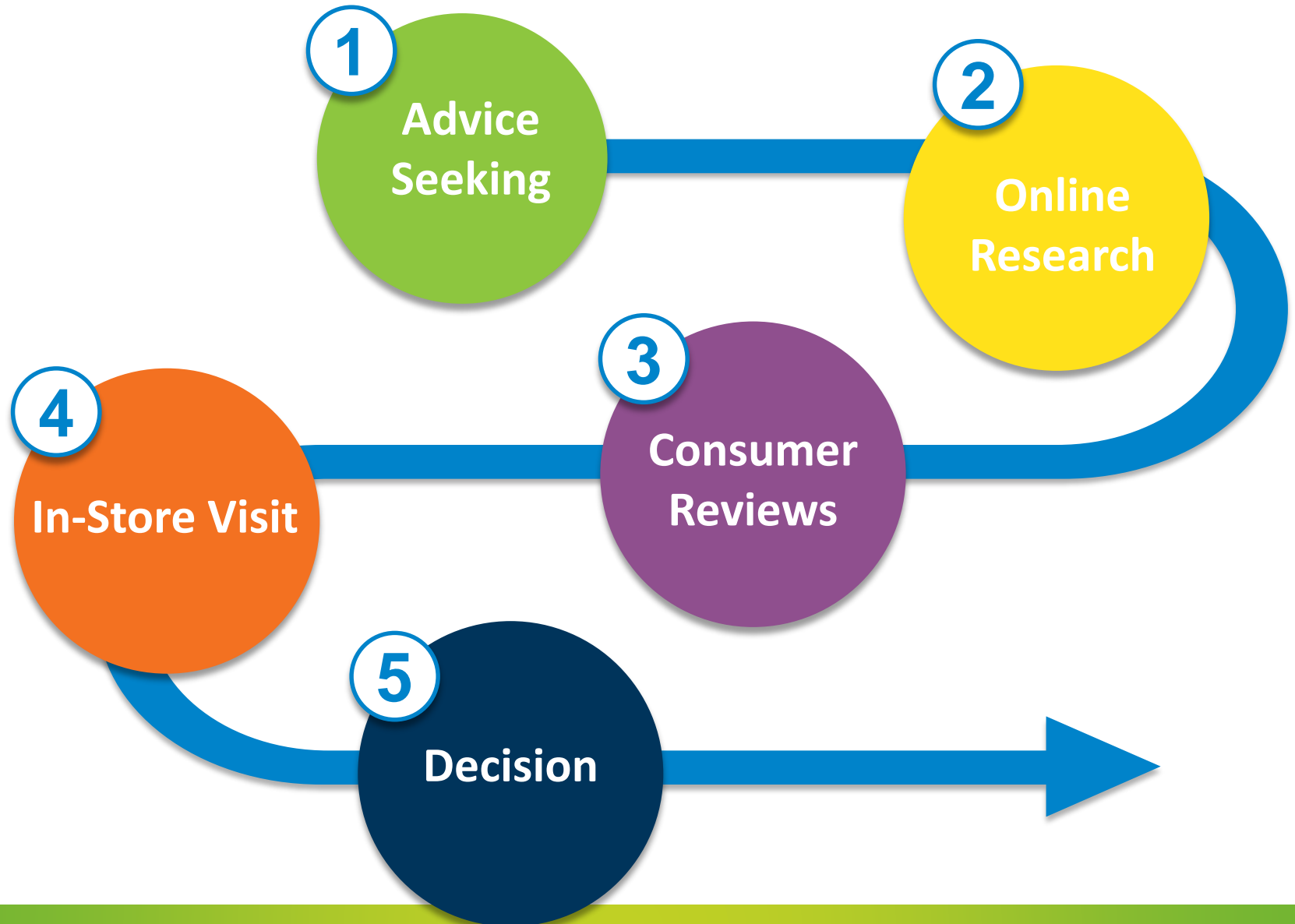
I'm always looking for ways to be more Energy Efficient - I want to save money and be kind the the environment!

We definitely care about the environment – there is only one planet Earth and I feel good when I make choices that help protect it.

That gives me peace of mind that I am saving some money and helping the world in little ways that hopefully add up

The Path-to-Purchase

There are five basic steps in the Path-to-Purchase of dryers



1

Advice Seeking

Advice seeking provides direction for future more in-depth research

Consumers know it is time to purchase a new dryer when they have to run a load more than once (because clothing is not fully dry) or it becomes too noisy.

- Their first step in the process almost always begins by simply asking friends and family about their experiences with their own dryers.
- Many consumers will also use social media, such as Facebook, to post a broader message to their network to ask for recommendations.



I typically ask my dad about these kinds of things. I respect his opinion and he will tell me the truth.

1

Advice Seeking

They look to people who they perceive to have relevant knowledge/experience

Someone with technical knowledge or experience, such as an appliance repair person or engineer.

A *TRUSTED* sales associate – perhaps someone they have a personal connection with or who they have worked with on other purchases

Those who have recently purchased – either a dryer or a washer*

Those with a similar family composition, as this would indicate similar needs for things such as capacity, versatility in settings and so on

** In some cases, the washer leads the purchase of a dryer, (especially if broken and need to go buy a new one) and if they require a matching set.*

On-line research is leveraged for in-depth comparisons

- After asking friends and family for advice, consumers look for a dryer **ONLINE**.
- They like to sift through all the different brands, options, specs online because they can easily compare and contrast different models.
- Some consumers do leverage social media, like message boards, for more information during this 'finding' phase.



Look online. I'm almost always connected to the internet, so it's a natural first resort. Usually start on my phone then look on a computer once I get things narrowed down.

On-line research tends towards three common approaches



Google tends to be the default for a starting point in researching. Many consumers use search terms related to a dryer, such as 'most efficient dryer' and 'best dryers'.



Many consumers also go directly to retailer websites to understand options. Favorites include Home Depot, Lowe's, Sears, and Best Buy—typically big box stores.

Water Heater Temperature set at 140°F			Water Heater Temperature set at 120°F		
Wash/rinse settings	kWh used	Avg. cost per load*	Wash/rinse settings	kWh used	Avg. cost per load*
Hot/Hot	8.3	\$2.49	Hot/Hot	6.5	\$1.95
Hot/Warm	6.3	\$1.89	Hot/Warm	4.9	\$1.38
Hot/Cold	4.3	\$1.29	Hot/Cold	3.4	\$1.02
Warm/Warm	4.3	\$1.29	Warm/Warm	3.4	\$1.02
Warm/Cold	2.3	\$0.69	Warm/Cold	1.9	\$0.57
Cold/Cold	0.4	\$0.12	Cold/Cold	0.4	\$0.12

*Cost assumes 30¢ per kWh.




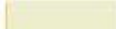

Brand/manufacturer websites are also searched for more specific information on dryers.

Consumer/Professional reviews play an important role in the dryer decision

- As consumers narrow down their list of options, they begin to read through consumer reviews (on various sites) including Consumer Reports which is a key resource.
- They are reading both the 'good' and 'bad' reviews to "get the full picture".
- Consumers say they use their judgment when sifting through reviews to decide for themselves if people are being honest about their experience or simply trying to "bash" a brand/model/product.
- Amazon is not as big an influence as it is in other categories.

Customer Reviews

14,482 Reviews

5 star:		(10,243)
4 star:		(2,510)
3 star:		(702)
2 star:		(374)
1 star:		(653)

Average Customer Review

★★★★☆ (14,482 customer reviews)

I start from the most recent [review] and read down. I will read probably 10 – 20 reviews (if there are that many) and then I always click on the one-star-ratings to read what people absolutely did not like. Most of the time the one star reviews are just disgruntled people, but some times I see something that makes me research my product a bit more.

4

In-Store Visit

The store can be helpful, but also overwhelming and confusing



Engaging
Choices
Overwhelming
Educational
Options
Exciting
Tedious

- The experience shopping for a dryer in-store varies greatly.
- Some find the experience to be helpful because they have learned more information in store that will help guide their decision.
- Others feel that this process takes way too much time and they are overwhelmed by the number of options available.

4

In-Store Visit

Respondents start their in-store visit by **DESELECTING** on price & features



- Those who like shopping in-store enjoy the tactile experience of actually seeing and touching the dryers (opening and closing the doors, seeing capacity, pushing buttons).
- Signs on the dryers in the store are helpful to navigate the numerous options.

At the store, I was able to get a feel for the actual size of the machine and also play with the touch screen a bit to see how that works. Can't do those things online!

Signs and brochures at the store were really helpful – they tell me if that item has what I'm looking for so I know whether to look at it or not.



4

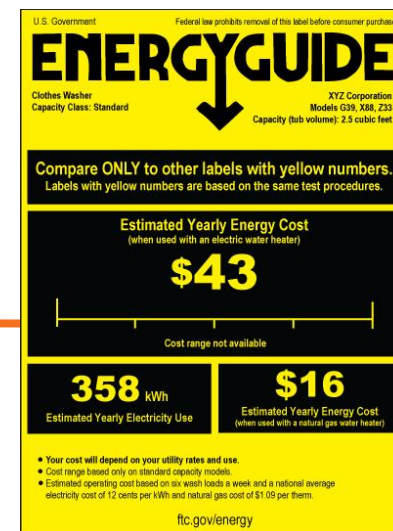
In-Store Visit

Respondents think they know how to find an energy efficient dryer – but they are looking for the wrong thing



Consumers are actively seeking the “ENERGY STAR® sticker”. It has become the point of market entry (anything without it is deselected).

However, consumers say it is a “yellow sticker” they are looking for when shopping with no awareness that this is the Energy Guide. The two have become synonymous in consumers’ minds.



On most appliances you will see the little yellow energy use label that oftentimes will tell you if it is energy star qualified or not. I saw them in many places while I was shopping for a dryer.

I thought all new appliances required ENERGY STAR®. I like that the sticker on the appliance gives you an estimated cost analysis. You know what to expect with an energy star rating. All my appliances are energy star rated.

The sales personnel were not really able to provide guidance

- Consumers have a negative impression of sales people.
- No one was rude or unpleasant, but some consumers were never even acknowledged.
- When they are present, they are friendly but they do not seem knowledgeable.
- They have to rely on information in the computer and are not able to provide "new information" compared to shopping online.

The store is only there for picking products not learning anything new.



Respondents say that the on-line research they did was most impactful in their final decision

PURCHASERS

- After going through this process again, most purchasers said they were happy with the dryer they selected.
- If they were to do it again, they said they would research more and they would worry less about the price.

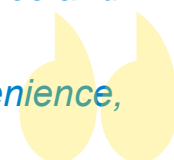
INTENDERS

- These consumers are feeling positive about purchasing their new dryer in the near future.
- Because of the amount of research they have completed, they believe they have the options for dryers narrowed down.

My suggestion to someone buying a new dryer is to do online research before you go to the store and ask friends and family. That will help you much more than anything or anyone at the store!

I want the best, not because I am a snob, but good quality products have better customer service and typically are just better products in general.

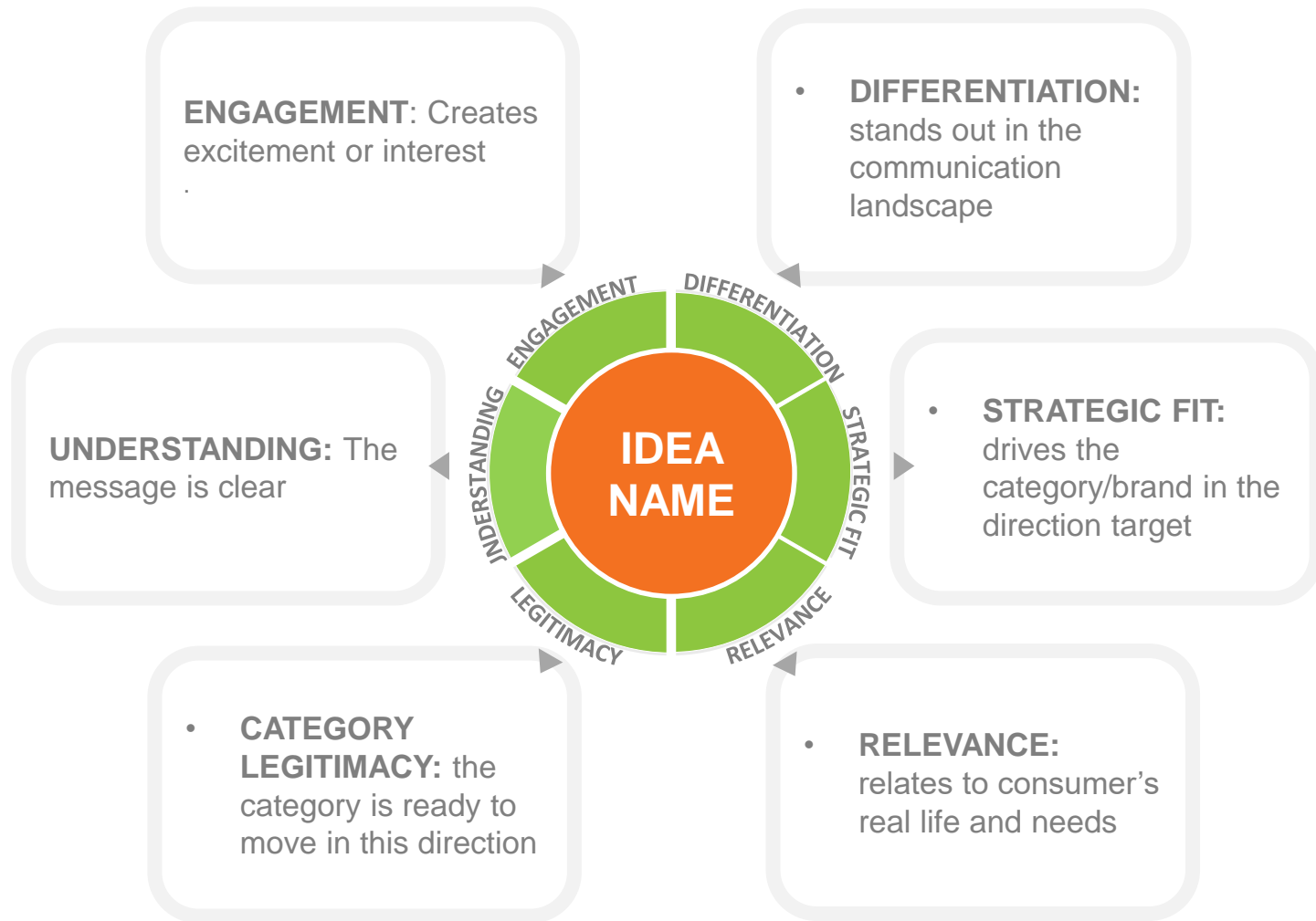
I've learned that price isn't everything. I prefer to pay a reasonable price and still get the convenience, quality, and performance that I expect.



Concept Assessment

























Six Successful Concept Attributes

The following slides summarize a series of concepts created and tested during the research. We have evaluated the feedback from each concept based on six attributes associated with concept success. Each attribute will be high, moderate or low.



Overall Concepts Snapshot

Better Dryer is the leading concept because it is the relevant to consumers and has the strongest Strategic Fit.

	CONCEPT T2 (Better Dryer)	CONCEPT E (ENERGY STAR®)	CONCEPT L (Living Values)	CONCEPT V (Vent-less)
Differentiation				
Strategic Fit				
Relevance				
Category Legitimacy				
Understanding				
Engagement				

 = High  = Moderate  = Low

*Full concept development and progression for all concepts can be found in the appendix.

“Better Dryer” is strong because it is meaningful and believable.

- The insight is meaningful and engaging, the benefit addresses core consumer needs and strong proof points help them understand how they will realize the benefit.

The last time I bought a dryer I had a flip phone and I’m sure they’ve come a long way since then. But it’s difficult to know which one is best for me now.

Introducing a better dryer that is safer, saves energy and is gentler on clothes.

That’s because it uses cutting edge heat pump technology, already proven in Europe. It uses heat differently to:

- Dry with less heat to protect clothes
- Reuse hot air to reduce energy use
- Reduce the risk of a fire because it doesn’t require a vent.

- **Understanding** is **HIGH** because this idea makes sense to consumers and provides enough information to explain the ‘how’.
- **Engagement** is **HIGH** because consumers are excited by the idea of a better dryer that offers energy efficiency through new, innovative means.
- **Strategic Fit** is **HIGH** because with the strong proof points, consumers immediately understand the energy efficiency of the dryer.
- **Legitimacy** is **HIGH** because consumers believe this idea in terms of energy efficiency, even without the Energy Star halo, but they are unsure of specific brands that might be believable in this space.
- **Relevance** is **HIGH** because consumers are very excited about this dryer, particularly driven by the reusing hot air (instead of heating cold air).
- **Differentiation** is **HIGH** because drying with less heat is not different or unique, but reusing hot air and a ventless feature is something new and different.



More efficient, better for earth and good on clothes. All good and need.

Better means better technology to help the environment, your home and the condition of your clothes

It has been tested and used in Europe. I think that it is a good thing because Europe always seems to be ahead of us with so many things.

“ENERGY STAR® ” is strong because it is appealing and builds on existing ENERGY STAR® equity.

- A ‘most efficient class of dryers’, ‘saving 3x more energy’ and ‘ENERGY STAR® Most Efficient’ verbiage is very easy for consumers to understand and is convincing.

I look for the ENERGY STAR® label when I buy appliances but now it seems like every dryer has Energy Star. I think Energy Star levels improve over time but how do I make sure I’m getting the most efficient Energy Star model?

Introducing a new generation of ENERGY STAR® dryers that saves even more energy.

That’s because now ENERGY STAR® certified the most efficient class of dryers that uses heat pump technology, saving 3x more energy than standard Energy Star. Just look for the “Energy Star Most Efficient” name when shopping!

- **Understanding** is **HIGH** because the idea is straightforward and concise. Consumers will be looking for a ‘name’ for this new line.
- **Engagement** is **HIGH** because consumers in the Northwest actively seek these kinds of products to help them “do their part for the environment”.
- **Strategic Fit** is **HIGH** because the link to energy efficiency is inherent in this idea given consumers are familiar with ES products and actively seek them.
- **Legitimacy** is **HIGH** because this idea is the best fit with Energy Star because it builds on their current base of knowledge.
- **Relevance** is **HIGH** because Consumers are already seeking ES products, including dryers. It is even better for them if there is some way to know these are the most efficient.
- **Differentiation** is **MODERATE** because the idea of Energy Star is not new, but the idea of an improved level of ES products is new and different.



It tells me that this dryer is the most efficient of all the energy star dryers on the market.

Because It Saves Money On Your Power And Is Better For The Environment

A lower electric bill is what I believe I would get as a result. It would use less power. I would also feel good that I was doing my part, however small, to help the planet due to my energy savings.

“Living Values” is appealing but not believable

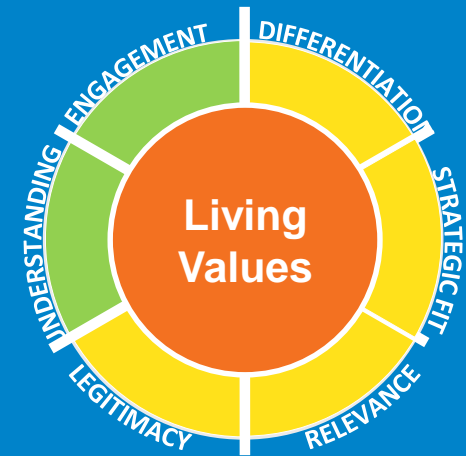
- ‘Helping the Environment’ is very appealing to consumers and they are interested in learning more. However, the direct connection between dryers and helping the environment is hard to deliver and believe. This idea would come to life best as a look/feel for a communication campaign.

I value the environment and I want to have an impact on the world I leave behind for future generations. I want to feel good about even the smallest choices I make everyday.

Now when you use your dryer, you can help the environment, too.

That’s because we’ve developed a new class of dryers designed with the environment in mind. It dries clothes the same as traditional dryers but uses less energy and has less impact on the environment.

- **Engagement** is **HIGH** because it fits with how they see themselves and their priorities
- **Understanding** is **HIGH** because the idea is clear, concise and consumers quickly understand the communication.
- **Differentiation** is **MODERATE** because marketing a dryer *designed* for the environment is new but the promise of energy efficiency is not.
- **Strategic Fit** is **MODERATE** because consumers immediately relate this idea to energy efficiency but it goes too far in claiming to help the environment and future generations.
- **Relevance** is **MODERATE** - Consumers in the Northwest are highly involved in sustainability, thus this idea is a perfect fit with their lifestyle. However, they are highly skeptical and need more information.
- **Legitimacy** is **MODERATE** Consumers believe Energy Star rated products easily fit with this idea. However, the dryer category is not yet in a strong position to make a ‘help the environment’ claim.



Climate change is here and real, anything we can do to slow it down or reverse is a good thing, We can all do our part impacting the world less.

I love the idea of leaving behind a better world for future generations but I just don't see how this dryer is going to do that.

“Ventless” performs lower because consumers can’t imagine themselves needing it.

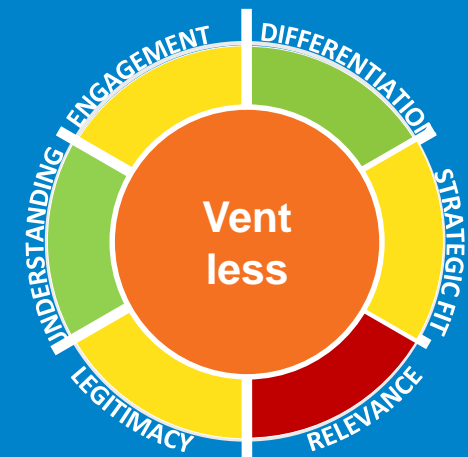
- A ventless dryer is intriguing to consumers but most can’t see themselves needing one. This idea seems like a good one to explore with other audiences like multi unit housing or commercial property owners.

I like knowing my dryer is energy efficient, but I wish I had the flexibility to put my dryer in a different location. Right now it has to be wherever the vent is.

Introducing a new type of energy efficient dryer that no longer needs a vent, so you can put it anywhere.

That’s because instead of constantly reheating cool air, it recycles the hot air inside the drum to dry your clothes, resulting in reduced energy use.

- **Understanding** is **HIGH** because Consumers quickly understand the idea (though they do have to work to understand the link to EE).
- **Differentiation** is **HIGH** because a dryer with no vent is completely new and different for consumers. They are impressed, excited and anxious to hear more about this idea.
- **Engagement** is **MODERATE** because consumers are excited to learn about the new technology of ventless, but do not see themselves necessarily purchasing one.
- **Strategic Fit** is **MODERATE** because consumers have to work harder on this idea to understand its relationship to energy efficiency—it is not as clear as other concepts.
- **Legitimacy** is **MODERATE** because consumers believe Energy Star products could fit here, but it is not obvious that the ventless option is energy efficient at first.
- **Relevance** is **LOW** because while consumers like the idea of flexibility, many consumers do not find themselves with a need for a ventless dryer.



I guess I mostly just like the idea that I "can" move it elsewhere and it will still work. At my house specifically it's not something we would likely use (as we have a dedicated laundry area), but I could see it being very useful in the case of, say, an RV or a house with more limited space.

It's exciting because it's different & unique, it's unlike all other dryers out there

As the concept evaluation phase progressed, some “do’s & don’ts” emerged

What Does Work



- Communicating innovation, especially when new and different
- Specifics in the proof points listed for believability purposes (see Better Dryer Concept)
- Magnitude of savings (i.e., 3X the savings) is more compelling than percentages (i.e., 30% more savings)
- Providing cues (so they know what to look for) when explaining energy savings

What Doesn't Work



- Energy efficiency by itself—it is nothing new
- Broader lifestyle ideas that are not connected to daily living choices
- Explaining energy savings relative to other appliances (such as washers and refrigerators)

What's the names of these generations? How will know if I'm buying one of them?

I've seen dryers make the claim they are built with the environment in mind. Nothing new here.

I'm not sure how much energy my dishwasher uses so this doesn't mean much.

Concepts that were discontinued can be found in the appendix



THANK YOU!




Arrow G Consulting

TOGETHER We Are Transforming the Northwest



Appendix

Appendix

Discussion Guide – Phase 1	 Microsoft Word Document
Discussion Guide – Phase 2	 Microsoft Word Document
Recruitment screener	 Microsoft Word Document
Evolution of Final Concepts <ul style="list-style-type: none"> • Better Dryer – T2 • Energy Star - E • Ventless - V • Living Values - L 	Slides 53-57 54 55 56 57
Evolution of Discontinued Concepts <ul style="list-style-type: none"> • Better Dryer (alternate version) – T1 • Feel Good About – G • Research For You – R • Saves More Energy - S 	Slides 58 - 66 59 - 60 61 - 62 63 - 64 65 - 66

Concept Progressions

Concept Progressions

The methodology used in this study enables NEEA's Super-Efficient Dryers Team to optimize the value-proposition statements by incorporating feedback from consumers into the development of the statements.

- DAY 1: Consumers see the first draft of the value proposition statements and provide feedback via on-line qualitative research
- DAY 2: NEEA SED team uses the feedback to modify, combine or drop statements from consideration.
- DAY 3: Consumers see the revised value proposition statements and provide feedback via on-line qualitative research
- DAY 4: NEEA SED team uses the feedback to modify, combine or drop statements from consideration.
- DAY 5: NEEA SED team uses the feedback to modify, combine or drop statements from consideration.

The following pages of this report captures how all the value proposition statements progressed through this process.

Concept T2 (Better Dryer)

Day One

Introducing the most technologically advanced dryer.

That's because it uses cutting edge heat pump technology, already proven in Europe, for premium dryer performance:

- Dries with less heat to protect clothes
- Reuses hot air to reduce energy use
- Doesn't require a vent.

Day Two

The last time I bought a dryer I had a flip phone and I'm sure they've come a long way since then. But it's difficult to know which one is best for me now.

Introducing a better dryer that is safer, saves energy and is gentler on clothes.

That's because it uses cutting edge heat pump technology, already proven in Europe. It uses heat differently to:

- Dry with less heat to protect clothes
- Reuse hot air to reduce energy use
- Reduce the risk of a fire because it doesn't require a vent

Day Three

*NO CHANGE FROM DAY TWO

The last time I bought a dryer I had a flip phone and I'm sure they've come a long way since then. But it's difficult to know which one is best for me now.

Introducing a better dryer that is safer, saves energy and is gentler on clothes.

That's because it uses cutting edge heat pump technology, already proven in Europe. It uses heat differently to:

- Dry with less heat to protect clothes
- Reuse hot air to reduce energy use
- Reduce the risk of a fire because it doesn't require a vent.



Concept E (ENERGY STAR®)

Day One

Introducing ENERGY STAR®'s most efficient class of dryers.

That's because ENERGY STAR® has created a most efficient class of dryers using heat pump technology which saves 3x more energy than standard ENERGY STAR®.

Day Two

I look for the ENERGY STAR® label when I buy appliances but now it seems like every dryer has Energy Star. I assume ENERGY STAR® levels improve over time. But how do I make sure I'm getting the most efficient ENERGY STAR® model?

Introducing a new generation of ENERGY STAR® dryers that saves even more energy.

That's because now ENERGY STAR® certified the most efficient class of dryers that uses heat pump technology, saving 3x more energy than standard ENERGY STAR®.

Day Three

I look for the ENERGY STAR® label when I buy appliances but now it seems like every dryer has ENERGY STAR®. I think ENERGY STAR® levels improve over time but how do I make sure I'm getting the most efficient ENERGY STAR® model?

Introducing a new generation of ENERGY STAR® dryers that saves even more energy.

That's because now ENERGY STAR® certified the most efficient class of dryers that uses heat pump technology, saving 3x more energy than standard ENERGY STAR®. Just look for the "ENERGY STAR® Most Efficient" name when shopping!



Concept V (Ventless)

Day One

Introducing a new type of dryer that doesn't have to be stuck in the basement.

That's because when we developed this new dryer technology for improved energy efficiency, it no longer needed a vent.

Day Two

I wish I had the flexibility to put my dryer in a different location but right now I know it has to be wherever the vent is.

Introducing a new type of energy efficient dryer that no longer needs a vent, so you can put it anywhere.

That's because instead of constantly reheating cool air, it recycles the hot air inside the drum to dry your clothes, resulting in reduced energy use.

Day Three

I like knowing my dryer is energy efficient, but I wish I had the flexibility to put my dryer in a different location. Right now it has to be wherever the vent is.

Introducing a new type of energy efficient dryer that no longer needs a vent, so you can put it anywhere.

That's because instead of constantly reheating cool air, it recycles the hot air inside the drum to dry your clothes, resulting in reduced energy use.



Concept L (*Living Values*)

Day One

Now when you use your dryer, you can help protect the environment, too.

That's because we've developed a new class of dryers designed with the environment in mind. It offers the same drying capability as traditional dryers but uses less energy and has less impact on the environment.

Day Two

I value the environment and I want to have an impact on the world I leave behind for future generations. I want to feel good about even the smallest choices I make everyday.

Now when you use your dryer, you can help the environment, too.

That's because we've developed a new class of dryers designed with the environment in mind. It dries clothes the same as traditional dryers but uses less energy and has less impact on the environment.

Day Three

***NO CHANGE FROM DAY TWO**

I value the environment and I want to have an impact on the world I leave behind for future generations. I want to feel good about even the smallest choices I make everyday.

Now when you use your dryer, you can help the environment, too.

That's because we've developed a new class of dryers designed with the environment in mind. It dries clothes the same as traditional dryers but uses less energy and has less impact on the environment.





Discontinued Concepts

- Concepts that did not perform well with consumers were discontinued in subsequent rounds of testing. In some cases, components of the concept that did well were integrated into other concepts to make the ideas stronger.

Concept T1 (Better Dryer)

Day One

Introducing a better dryer that makes choosing a dryer easy.

That's because all you have to do is look for heat pump technology which is engineered to be different. It's safer, saves energy and is gentler on clothes.

Day Two

Discontinued. Proof points used as a benefit statement in Concept T2.

Day Three

Discontinued.



CONCEPT T1

Introducing a better dryer that makes choosing a dryer easy.

That's because all you have to do is look for heat pump technology which is engineered to be different. It's safer, saves energy and is gentler on clothes.

POSITIVES

- They believe heat pump and there is some familiarity with the concept of a HP.
- Gentler on clothes
- Saves Energy
- Makes choosing easier
(Proof point (RTB) is more compelling though)
- People want it to be easier to choose
- Safe = POM (emotional territory)
- Heat pump = cool (some awareness)
- Designed to be different



OVERALL REACTIONS

- Very positive reaction – more about the RTB than the benefit
- Implies saving money over time and good for environment
- Heat pump and gentler on clothes are differentiators
- Want to know more about heat pump technology and how it's safer, gentler

NEGATIVES

- Benefit sounds 'cheesy' and like a sales pitch
- 'Better' is too vague in the benefit
- Want to more about how heat pump technology is better/safer
- Sounds expensive

Concept G (Feel Good About)

Day One

Introducing a dryer you can feel good about.

That's because heat pump dryer technology saves you the same amount of energy as your dishwasher and clothes washer use combined.

Day Two

Discontinued. "Feel good about" added to the insight of Concept L.

Day Three

Discontinued.



CONCEPT G

Introducing a dryer you can feel good about.

That's because heat pump dryer technology saves you the same amount of energy as your dishwasher and clothes washer use combined.

POSITIVES

- Uses “*way less energy*” than other dryers
- Anticipation of considerable savings on bills
- Consumers link this to helping the environment without an overt message about it
- Inspires confidence ('feel good about')



OVERALL REACTIONS

- HPT is new and different for dryers
- Money savings is implied (very positive)
- Comparisons to the amount of energy saved is confusing for some

NEGATIVES

- Need more information on HPT
- Some are struggling with the comparison, it is too vague
- Some price concerns

Concept R (Research For You)

Day One

Introducing a class of energy efficient dryers so good you don't need to look anywhere else.

That's because Energy Star has already done the work for you by creating a "most efficient" class of dryers using heat pump technology.

Day Two

Discontinued

Day Three

Discontinued



CONCEPT R

Introducing a class of energy efficient dryers so good you don't need to look anywhere else.

That's because Energy Star has already done the work for you by creating a "most efficient" class of dryers using heat pump technology.

POSITIVES

- They trust the Energy Star brand—so it makes sense that this would be the most efficient
- Some are familiar with the heat pump technology (for water heaters)
- Expectations of "*great energy savings*"
- For those who have looked, they are very tired of looking (rings true with them)
- HPT is different and new



OVERALL REACTIONS

- Very clear—they quickly understand this is the most efficient dryer on the market
- Strong trust and believability because of the Energy Star halo
- Mixed feedback on the "search" (those who have done it, get it; those who have not searched yet, don't)

NEGATIVES

- 'Don't need to look anywhere else' is confusing for those who haven't researched anything yet
- Some pushback on not needing to look anywhere else ("*kind of boastful, you should always look*")
- Heat pump is confusing for those not familiar with it—they need more information
- The 'work' that is being done for them is vague, needs more specifics
- HPT is unfamiliar for some
- Claim of 'most efficient' is not new or different

Concept S (Saves More Energy)

Day One

Introducing a new generation of Energy Star dryers that saves even more energy.

That's because heat pump dryer technology saves 30% more energy than dryers without it, taking Energy Star to the next level.

Day Two

Discontinued. Overlap with Concept E.

Day Three

Discontinued.



CONCEPT S

Introducing a new generation of Energy Star dryers that saves even more energy.

That's because heat pump dryer technology saves 30% more energy than dryers without it, taking Energy Star to the next level.

POSITIVES

- 30% sounds good but not as good as 3x
- Like that the amount is quantified
- New generation = innovation

OVERALL REACTIONS

- Understood to mean 30% more energy savings
- Saving energy is saving money
- Heat pump is differentiator

NEGATIVES

- Saves 30% more is a very awkward way of saying it. I think you mean, based on a previous exercise, that it takes a third of the energy.
- Not as much detail as other ideas

