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Energy Forward Consumer Messaging Study

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1. EXECUTIVE SUMMARY

The Northwest Energy Efficiency Alliance (NEEA) is a non-profit organization working to effect market transformation through the acceleration and adoption of energy-efficient products, services and practices. NEEA is an alliance of more than 100 Northwest utilities and energy efficiency organizations working on behalf of more than 12 million energy consumers.

This report presents findings from the Energy Forward Consumer Messaging Study conducted on behalf of NEEA by Opinion Dynamics (the team). The purpose of this study is to assess whether NEEA can deploy the Energy Forward mark as a platform or parent brand for all of its initiatives.

Energy Forward Description and Background

NEEA has worked with utilities in the region, ENERGY STAR® and select retailers to create the "Energy Forward" mark or logo, which points shoppers to the most energy-efficient electronics on the market. Marketing collateral states that "Energy Forward televisions are engineered to be the best of ENERGY STAR." To date, NEEA has deployed the Energy Forward mark specifically in support of its efforts to promote energy-efficient televisions although they are considering the possibility of expanding the brand into other product categories. Figure 1 shows the images currently associated with the brand.

Figure 1. Energy Forward Images

Energy Forward Mark	Energy Forward Full Logo
	

NEEA developed Energy Forward for use as a broad platform, and implemented it primarily for use in point-of-purchase (POP) decisions, but also secondarily for mass-market efforts. At the time of this study NEEA had performed market research to inform the development of Energy Forward, but had not tested Energy Forward awareness. As a result, the team expected awareness of the brand to be low.

Research Objectives

The Energy Forward Consumer Messaging Study seeks to understand awareness of and associations with the Energy Forward mark, and the potential to use the mark as a parent brand across a range of NEEA initiatives.

Research Activities

Table 1 summarizes the two data collection activities that informed the Energy Forward Consumer Messaging Study.

Table 1. Consumer Messaging Study Data Collection Activities

Activity	Sample Size	Research Questions Addressed
Internet-Based Message Testing	787	1, 2, 3, 4, 5
One-on-One Interviews	35	1, 2, 4, 5

Key Findings

The Energy Forward Consumer Messaging Study yielded a number of key findings related to awareness of the Energy Forward mark and its potential use as an umbrella brand.

- ***Awareness of Energy Forward is extremely low.*** No survey participants mentioned Energy Forward unaided when asked about brands, campaigns, or initiatives that encourage people to save energy in the region, and only seven percent of people recognized the Energy Forward logo (fast forward mark only; See Figure 1). A much higher percentage of people (38%) report having seen the Energy Forward mark when it is shown with the associated "most efficient" language and ENERGY STAR logo compared with the fast forward mark alone. However, one-on-one interviews showed that those who claimed to recognize the full Energy Forward logo mainly recognized the ENERGY STAR logo.

- ***The full Energy Forward logo conveys notions of saving energy and money, as well as helping the environment***. Few consumers associated the mark with advanced technology and the meaning of the mark does not vary across product categories. In addition, as shown through the one-on-one interviews, it is the presence of the ENERGY STAR logo within the full Energy Forward logo that helps provide meaning to the mark.

- ***Almost all consumers have a favorable opinion of Energy Forward after it is described to them.*** In addition, the majority of consumers indicated in one-on-one interviews that the presence of the Energy Forward mark on an appliance would motivate them to purchase it given that they understood the meaning behind the mark.

- ***In general, consumers think that the Energy Forward mark fits well with the products offered across NEEA's initiatives.*** Over half of residential consumers feel the mark fits very well with clothes dryers, water heaters, and heating and cooling systems. One-on-one interview findings show that the fit between Energy Forward and appliances is more intuitive for consumers compared to items such as windows or new homes. However, these interviews also revealed that as long as the individual is thinking of energy efficiency in a broad sense, they are able to make the connection between the mark and a wide range of products, including new homes and windows.

- ***Awareness of both regional and national coexisting brands, such as TopTen USA, is low.*** In particular, the research shows that aided awareness by name ranges from two percent for TopTen USA to eight percent for Simple Steps, Smart Savings. Consumers also have few opinions of these brands. After reading a description of the brands, in each case, over half of the respondents indicated that they had neither a favorable nor an unfavorable opinion of them.

- ***ENERGY STAR is the only existing brand with any recognition among residential consumers.*** Therefore, it is the only viable partner for NEEA in moving ahead with the

Energy Forward brand. Ninety percent of Internet survey respondents had seen or heard of ENERGY STAR.

- ***Low awareness and limited familiarity with Energy Forward lead to questions from consumers about what the brand represents and whether it can be trusted.*** One-on-one interviews indicate consumer interest in and uncertainty about what's behind Energy Forward and how they can judge whether the information provided is legitimate. Energy Forward needs to establish consumer trust if individuals are going to respond to messaging and calls-to-action.

Conclusions and Recommendations

This study has two key conclusions with associated recommendations.

- ***Energy Forward does not currently communicate advanced technology or a sense of "staying ahead of the curve."*** Consumers noted key themes related to saving energy, saving money, and the helping the environment or "being Green" when looking at the Energy Forward logo. Further, if Energy Forward is used as an umbrella brand, messaging around advanced technology is not critical, as customers do not list that as an important characteristic when purchasing appliances or electronics.

    - ***Recommendation: Consider changes to Energy Forward messaging - namely moving away from highlighting the latest technology - if it is used as an umbrella brand in the future.***

- ***Energy Forward can serve as an umbrella brand for NEEA's initiatives.*** There is no other viable parent brand in the market and consumers believe Energy Forward can be applied to a wide range of products. In addition, given weak associations with Energy Forward, NEEA has a blank slate from which to establish it as an umbrella brand.

  Two challenges exist, however: low awareness, and a lack of trust in the relatively unknown brand. Consumers know and value ENERGY STAR, and as a result, it has the potential to help Energy Forward establish credibility in the short term.

    - ***Recommendation: Establish an internal team to revisit the Energy Forward mark, the idea and identity behind it, as well as desired associations for the brand if NEEA chooses to use the mark more broadly.***

    - ***Recommendation: In the short term, continue to leverage the partnership with ENERGY STAR.***

2. INTRODUCTION

This report presents results from the Energy Forward Consumer Messaging Study conducted by Opinion Dynamics on behalf of the Northwest Energy Efficiency Alliance (NEEA). The objective of this research was to assess the feasibility of deploying the Energy Forward mark as a platform or parent brand for all of NEEA's initiatives. This study also assessed the brand's elasticity or ability to extend into new product categories as well as the potential use of existing energy efficiency brands to help spur market transformation across NEEA's retail products.

The Energy Forward Consumer Messaging Study addresses the following research questions:

1. Can the Energy Forward mark be applied across the suite of products for which NEEA has developed or has plans to develop initiatives?
2. Does it communicate advanced technology and a sense of staying "ahead of the curve"? If not, what does it communicate to consumers across product categories?
3. What, if any, alternatives should NEEA consider or test as a parent brand across all products?
4. Does an umbrella brand make sense for NEEA, or would common messaging across several brands be a better approach?
5. What barriers exist to the use of Energy Forward as a platform or parent brand for NEEA's multiple product categories?

Energy Forward Description and Background

NEEA has worked with utilities in the region as well as ENERGY STAR® and select retailers to create the "Energy Forward" mark or logo, which points shoppers to the most energy-efficient electronics on the market. Marketing collateral states that "Energy Forward televisions are engineered to be the best of ENERGY STAR." To date, NEEA has deployed the Energy Forward mark specifically in support of its efforts to promote energy-efficient televisions.

NEEA developed Energy Forward for use as a broad platform, and implemented it primarily for use in point-of-purchase (POP) decisions, but also hoped to use it for secondary mass-market needs. Early research on potential messaging conducted by Egg in 2010 informed this process.

At the time of this study, NEEA had not performed any testing of Energy Forward, and, the team expected awareness of the brand to be low.

3. METHODOLOGY

This study includes findings from an Internet survey and one-on-one in-depth interviews. The following sections provide detailed information about the methodology, and the Appendices contain each of the data collection instruments used.

3.1 OVERALL APPROACH

3.1.1 QUALITATIVE AND QUANTITATIVE METHODS

The team used a combination of quantitative and qualitative methods for this study. As shown in Table 2 below, the team's core approach was a quantitative survey effort that explored brand elasticity as well as potential alternative brands. In addition, we utilized a qualitative research effort to complement the quantitative component and provide more in-depth research.

Table 2. Data Collection Approach

Component	Interviews	Sample Source
Internet-Based Message Testing (Internet Panel)	787	Internet Panel
One-on-One Consumer Interviews	35	Internet Panel

This hybrid approach provides a number of benefits. First, online research was the best approach for this study, given the ability of this platform to present visual images such as the Energy Forward mark, mock-ups of the mark on other types of products, and coexisting brands. Gathering consumer feedback on the visual elements of the current messaging strategy was critical to determining whether NEEA can apply the Energy Forward mark more broadly.

Second, the one-on-one interviews allowed the team to gather more in-depth qualitative insights on consumer perceptions of the Energy Forward mark, and to assess the perceived fit between the current Energy Forward mark for televisions and an expanded brand covering many products. This approach allowed the team to delve more deeply into an individual's specific responses to the Internet survey to enhance our understanding of consumer perceptions of the existing brand and issues around extension.

3.2 DATA COLLECTION METHODS

3.2.1 INTERNET PANEL

Opinion Dynamics fielded the Internet survey from September 11-24, 2013. The team designed the Internet survey to explore awareness and perceptions of the Energy Forward mark, as well as its potential elasticity with residential consumers in Idaho, Montana, Oregon and Washington.

Sample Design

In designing the sampling approach for this project, the team considered past NEEA research and differences between urban and rural populations in Idaho, Montana, Oregon and Washington. As a result of these factors, the team utilized a sample design that oversampled rural residents across the states so there would be a large enough sample of rural respondents to make comparisons to

urban respondents.[1] The classification of urban and rural areas is based on the United States Department of Agriculture's Rural-Urban Continuum Codes (RUCC), which classify metropolitan counties based on the size of the population in a given county's metro areas, and non-metropolitan counties based on their level of urbanization and proximity to metro areas (USDA Economic Research Service 2013a).

Table 3 below presents a snapshot of the population for analysis based on RUCC data (USDA Economic Research Service 2013b). For this effort, the target population within all states is made up of adults 18 years of age or older. In addition, the team screened for individuals involved in purchasing energy-consuming products for their homes.

Table 3. Regional Population Data by Urban and Rural

State	Total Population (2010)	Metro Population (Urban)		Non-Metro Population (Rural)	
		#	% of Total	#	% of Total
Washington	6,724,540	6,019,776	90%	704,764	10%
Oregon	3,831,074	3,177,936	83%	653,138	17%
Idaho	1,567,582	1,023,210	65%	544,372	35%
Montana	989,415	349,560	35%	639,855	65%
Total	**13,112,611**	**10,570,482**	**81%**	**2,542,129**	**19%**

Source: USDA Economic Research Service 2013a

The sample for this data collection effort is provided by Research Now, which maintains an opt-in panel.[2] At the outset, the sample is selected based on geographic region, and everyone in this selected sample is invited to take the survey. There were 4,757 panel members in the target region who received an invitation to take the online survey. This number is based on continuous monitoring of the response by Research Now and the release of sample in batches.

In addition, the evaluation team set quotas by region based on the proportion of adult residents in each to ensure that sufficient data were available in rural areas. Table 4 below summarizes the number of completes by region.

[1] The team understands that while there has not been a significant difference in marketing between urban and rural areas, marketing efforts have varied in terms of their timing, placement, and the channels used. Program staff informed the team that marketing channels may be the most important factor on a geographic basis.

[2] Due to declining survey response rates of telephone surveys and high associated costs, survey researchers are increasingly using opt-in internet panels to field surveys. Internet panel surveys of this type have produced results as good as or better than traditional probability surveys for pre-election polling. These results have increased researchers' confidence that opt-in internet panel surveys are a viable alternative to telephone surveys.

Table 4. Internet Panel Sample Design

Respondent Group	Completed Interviews
Urban	401
Rural	386
Total	787

Weighting

Given the oversampling of rural consumers and associated undersampling of urban consumers, the team applied the following weights to the survey data for analysis.

Table 5. Internet Panel Weights

Respondent Group	% of Population	% of Completes	Weight
Urban	81%	51%	1.58
Rural	19%	49%	0.40
Total	100%	100%	1.98

Survey Dispositions and Response Rate

Opinion Dynamics fielded the Internet survey from September 11-24, 2013. As shown in Table 6, nearly everyone in the sample qualified to take the survey. Ultimately, 17% of eligible panel members completed a survey.

Table 6. Internet Panel Dispositions and Response Rate

Disposition	N
Total Emails Sent	4,757
Completes	787
Qualified	4,710
Incidence (Qualified/Those Screened)	95%
Response Rate (Completes/Total Sample)	17%

3.2.2 ONE-ON-ONE INTERVIEWS

The team used one-on-one interviews to gather more in-depth qualitative insights on consumer perceptions of the Energy Forward mark, as well as to assess the perceived fit between the current Energy Forward mark for televisions and an expanded brand covering many products. We conducted the interviews via telephone and used the Internet to display relevant images. Each interview lasted for approximately thirty minutes.

Sample Design

Opinion Dynamics recruited interview participants directly from the Internet panel effort. In total, 100 respondents indicated a willingness to participate in a follow-up interview. The team was ultimately able to complete thirty-five interviews with Internet survey respondents in two

groups. The first contained individuals who indicated awareness with Energy Forward,[3] and the second contained individuals who had purchased a new television in the past year. The team chose to target these two groups in order to allow for a general exploration of associations and perceptions, as well as an in-depth exploration of the mark with those who had actually been exposed to it in the target market.

Table 7. One-on-One Interview Sample Summary

Group	Potential Recruits	Completed Interviews
Aware of Energy Forward	37	18
TV Purchaser	27	17
Total	100	35

[3] Selection was based on four survey questions measuring awareness of Energy Forward unaided, aided by name only, and aided with logo.

4. FINDINGS

This section of the report presents findings from the Internet survey and the one-on-one interviews. In general, differences between urban and rural areas are called out when statistically significant at the 90% level. When not explicitly stated, differences are not statistically significant.

4.1 ENERGY FORWARD AWARENESS

Opinion Dynamics tested two types of awareness of the Energy Forward mark among the general population. The survey tested *unaided awareness* by asking respondents to identify the brands, campaigns, or initiatives they are familiar with in their region. To test *aided awareness*, the survey asked respondents if they had heard about specific brands, campaigns, or initiatives by name. The team supplemented measures of aided awareness by showing the Energy Forward mark and full logo.

4.1.1 UNAIDED AWARENESS

Unaided brand awareness, or top-of-mind recall of the name Energy Forward, is non-existent. As shown in Table 8 below, none of the consumers that completed the survey mentioned Energy Forward when they were asked to "name the brands, campaigns, or initiatives they had heard of in the past year that encourage people in the region to save energy." This is not surprising, given the limited marketing that has taken place outside of point-of-purchase (POP) materials since NEEA introduced the mark.

Overall, most residents were unable to name any brand, campaigns, or initiatives. Moreover, unaided awareness of ENERGY STAR, a prominent energy brand, was also very low despite the fact that this brand has an established national presence. The most popular and common responses related to specific appliance brands such as Samsung and GE, as well as utility companies, both by name and as a general reference.

Table 8. Unaided Awareness of Energy Efficiency Brands, Campaigns, or Initiatives

Brand, Campaign, or Initiative	Percent of Respondents
Brand Name (Appliance Company)	21%
Utility Company	18%
Utility Rebate Program	9%
ENERGY STAR	8%
Energy-Saving Action	5%
Brand Name (Car Company)	4%
Energy Trust of Oregon	2%
Energy Source (Solar, Gas, etc.)	2%
Tax Incentive/Government Rebate	1%
Advertisements	1%
Brand Name (Retail Store)	1%
Energy Save/Energy Saver	1%
Appliance Recycling Program	1%

Notes: Result of survey question *A1b: What brands, campaigns, or initiatives have you heard of in the last year that encourage people to save energy in your region? Please list up to three if you can. (Brands, campaigns, or initiatives listed by less than one percent of respondents not reported.)*
Total n = 787.

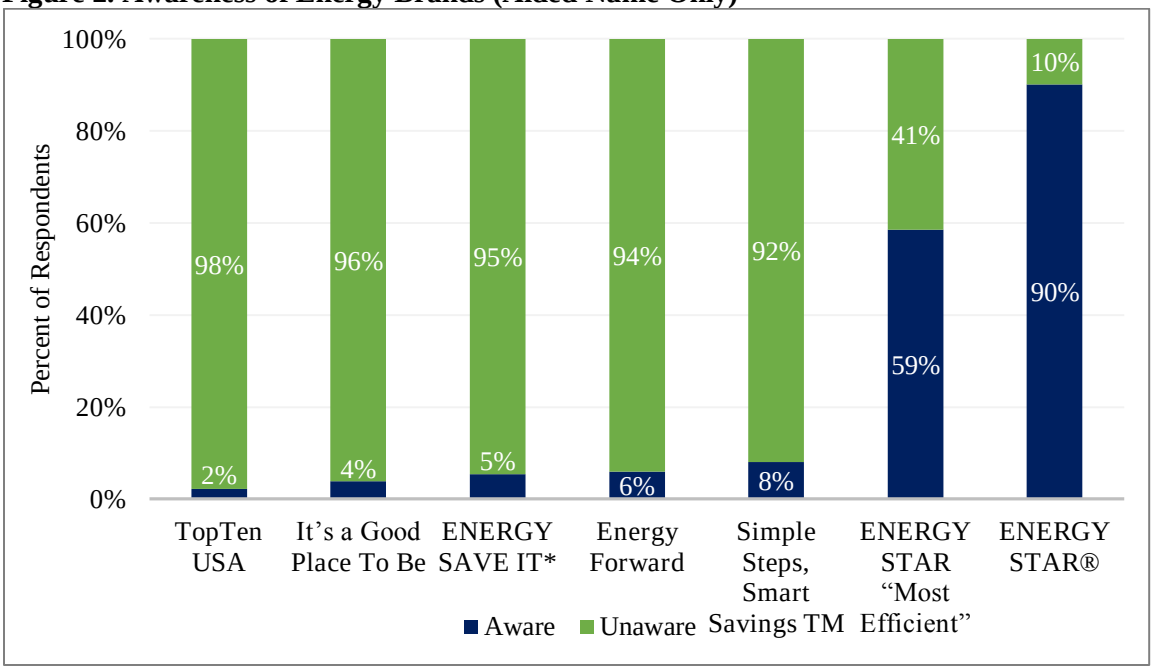
4.1.2 AIDED AWARENESS

The Internet survey asked respondents whether they had heard of several energy efficiency campaigns, including Energy Forward. The campaign names were listed together and the order of the list was rotated. Overall, six percent of consumers reported that they had heard of the Energy Forward name. There are no statistically significant differences in awareness between urban and rural areas.

The list also included ENERGY STAR, an energy brand that has been widely promoted nationally and in the Pacific Northwest for many years, and a brand that does not exist called "Energy Save It."[4] The other brands included TopTen USA, It's a Good Place to Be, and Simple Steps, Smart Savings. With the exception of ENERGY STAR, all of the brands tested were virtually unknown to respondents. Notably, five percent of respondents claimed to have heard of "Energy Save It," which illustrates that brands with very low awareness are essentially unknown. The survey is likely picking up some general awareness of energy efficiency marketing.

[4] The team included this false response option for respondents to provide context around the reliability of self-reported information.

Figure 2. Awareness of Energy Brands (Aided Name Only)



Notes: Result of survey question *A2: Please indicate whether you have heard of each of the following brands, campaigns, or initiatives that encourage people to save energy in your region.*
Total n=787.
**ENERGY SAVE IT is a decoy brand.*

As a final step in assessing awareness of the Energy Forward mark, Opinion Dynamics showed Internet survey respondents two images. The first contained the Energy Forward mark alone, while the second contained the full logo, which consists of the mark and associated language.

Figure 3. Energy Forward Images

Energy Forward Mark	Energy Forward Full Logo
	

While awareness of the mark alone (7%) is generally consistent with aided awareness by name (6%), awareness jumped to 38% when we showed the full logo.

Table 9. Awareness of the Energy Forward Mark (Aided with Logo)

Image	Percent of Respondents
Energy Forward Mark	7%
Energy Forward Full Logo	38%

Notes: Result of survey question *A4a and A4b: Before taking this survey, had you seen this logo? And what about this logo? Had you seen this before taking this survey?*
Total n = 787.

However, the one-on-one interviews conducted following the Internet survey revealed that respondents who said they had seen the full logo actually had not. More specifically, none of the one-on-one interview participants, whom the team selected based on their reported awareness of Energy Forward, could confirm that they had seen the mark when it was discussed in greater detail during the interviews. These discussions indicated that in some cases individuals had only seen the ENERGY STAR logo, while others stated that they had seen the Energy Forward mark, but in applications where it has never been used.

When asked whether there was anything confusing about the Energy Forward logo, over two-thirds of interview respondents (70%) thought that it was clear, but a few respondents were confused about how the Energy Forward campaign related to ENERGY STAR (18%), and what sort of criteria qualified a product for the "most efficient" designation (12%).

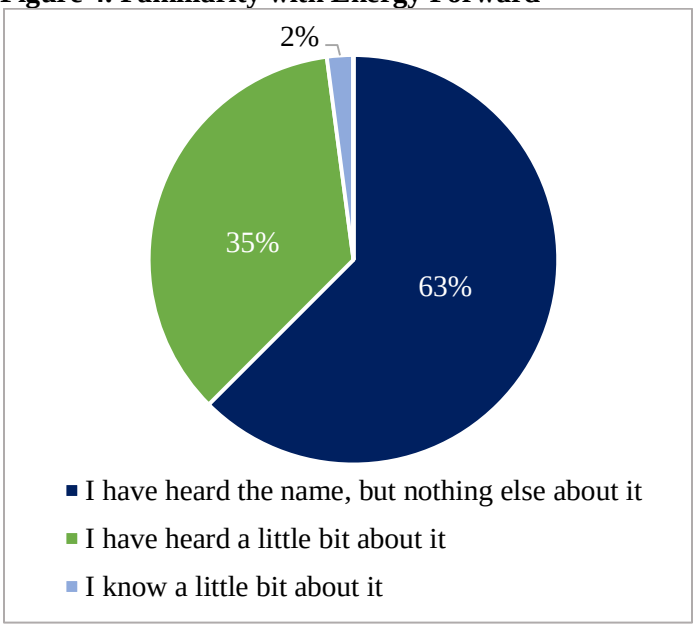
The team's efforts to explore awareness among those who made a recent television purchase (and therefore had a greater chance of exposure to the mark) produced similar results. One-on-one interviews with Internet survey respondents who had purchased a television in the past year indicated that none of them had seen or could recall seeing the Energy Forward mark while shopping for their television. As a result of these findings, we believe that aided awareness with the logo is closer to the seven percent reported based on the mark alone.

4.2 ENERGY FORWARD FAMILIARITY AND ASSOCIATIONS

4.2.1 BRAND FAMILIARITY

While six percent of consumers say they have heard of Energy Forward, the research shows that most of them do not know anything about it. As shown in Figure 4 below, most of the "aware" respondents know only the name (63%), and only about a third (35%) have heard something about it. No one said that they know a lot about Energy Forward. There are no differences in the level of familiarity between urban and rural areas.

Figure 4. Familiarity with Energy Forward



Notes: Result of survey question *A3: How familiar are you with the Energy Forward mark?*
Total n = 48.

4.2.2 BRAND ASSOCIATIONS

The study also explored brand associations. The team gathered this information through the Internet survey by asking respondents what three words or phrases came to mind when looking at the full Energy Forward logo. Over half (56%) mentioned saving energy or energy efficiency. Other responses include a generally positive reference to being the best (24%), saving money or getting rebates (23%), environmentally friendly or Green (18%), and moving forward (17%). In addition, the strong directionality of the logo frequently came up in the one-on-one interviews. Respondents felt instinctively that the meaning of the logo was to look to the right or move/walk to the right. Many respondents also identified the logo as a fast forward symbol. Table 10 below depicts the full extent of unaided associations.

Table 10. Unaided Associations with Energy Forward (Full Logo)

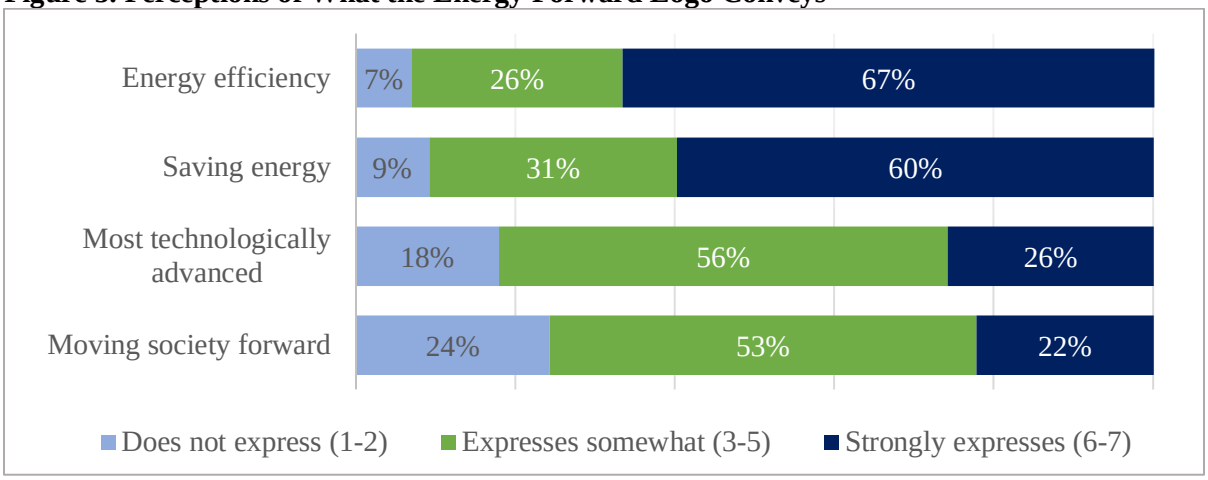
Associations	Percent of Respondents
Saving energy/electricity/efficient	56%
Best/good/most (general)	24%
Saving money/rebates	23%
Environmentally friendly/Green/clean	18%
Moving forward/movement	17%
Bright/eye-catching/interesting	12%
Saving (general)	10%
ENERGY STAR is familiar	9%
Energy (general)	8%
Latest tech/state-of-the-art	8%
Confusing/busy	8%
Reliable/trustworthy/tested	7%
Fast forward/video reference	7%
Boring/generic/ugly	5%
More expensive/cost/money	5%

Notes: Result of survey question *A5: Please provide three words or phrases that come to mind when you look at this logo. Associations listed by less than 5% of respondents not reported.*
Total n = 787.

In addition to assessing unaided associations, Opinion Dynamics asked Internet survey respondents to indicate how closely they associated several phrases with the mark, including "energy efficiency," "saving energy," "most technologically advanced," and "moving society forward." As shown in Figure 5 below, the majority feel that the mark strongly conveys energy efficiency and saving energy, while less than a third of respondents feel the mark strongly conveys the idea of most technologically advanced or moving society forward.[5]

[5] Selection was based on four survey questions measuring awareness of Energy Forward unaided, aided by name only, and aided with logo (mean scores of 4.18 for rural and 3.93 for urban).

Figure 5. Perceptions of What the Energy Forward Logo Conveys



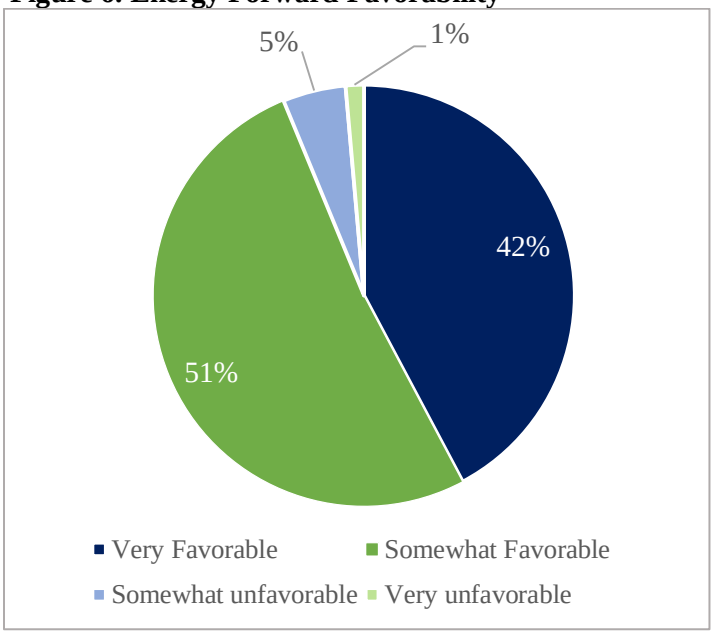
Notes: Result of survey question *A6: How much does the logo express the following: energy efficiency, saving energy, most technologically advanced, moving society forward?*
Total n = 787.

Collectively, the findings related to aided and unaided associations illustrate that Energy Forward has weak connotations. This provides NEEA with an opportunity to establish desired associations through brand extension efforts and marketing of Energy Forward.

4.2.3 ATTITUDES TOWARD ENERGY FORWARD

This research also indicates that public support exists for the concept behind the Energy Forward mark, which is essential for future branding efforts. As shown in Figure 6 below, the vast majority of Internet survey respondents have a favorable opinion of the brand after reading a short description of it.

Figure 6. Energy Forward Favorability



Notes: Result of survey question *A7a: (After reading a brief description of Energy Forward) Do you have a very favorable, somewhat favorable, somewhat unfavorable, or a very unfavorable opinion of Energy Forward?*
Total n = 787.

We also explored consumer attitudes toward the logo as part of the one-on-one interviews. In particular, respondents find the color (26%), the presence of the ENERGY STAR logo (26%), the wording "Most Efficient" (20%), and the fast forward symbol (14%) appealing.

Table 11. Appealing Energy Forward Characteristics (Multiple Response)

Characteristic	Percent of Respondents
The color	26%
The ENERGY STAR logo	26%
The wording: "Most Efficient"	20%
The fast forward symbol	14%
It is suggestive of saving money	11%
It is concise	11%
It is suggestive of efficiency	9%
The clean design	9%
It is suggestive of saving energy	9%
It is suggestive of progress	9%
It is visually appealing	9%

Notes: Result of survey question 2-4 and 3-9: *What appeals to you about the Energy Forward mark?* (Characteristics listed by less than four respondents not reported.)
Total n = 35.

While a third of the interview respondents said there is nothing unappealing about the logo (31%), others were confused about its meaning (14%), or did not like the color scheme (11%).

Table 12. Unappealing Energy Forward Characteristics

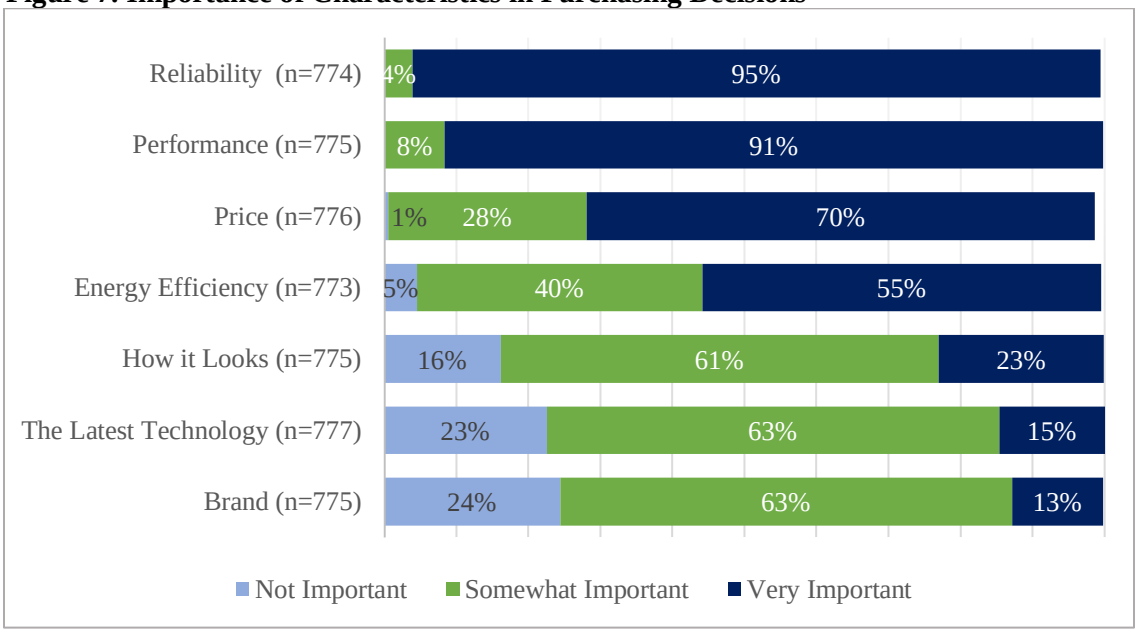
Characteristic	Percent of Respondents
Confusion about meaning	14%
The color scheme	11%
The text	9%
The simplicity of the design	9%

Notes: Result of survey question 2-4 and 3-9: *What does not appeal to you [about the Energy Forward Mark]?* (Characteristics listed by less than four respondents not reported.)
Total n = 35.

4.2.4 SHAPING BRAND IDENTITY AND FUTURE ASSOCIATIONS

In establishing future associations with the brand, it is important to acknowledge that across products, consumers place the most value on reliability and performance when shopping for a new home appliance or new home electronics. As a result, Energy Forward may not be highlighting the most salient non-energy benefits[6], and therefore, messaging around advanced technology is not critical for the brand in the future. However, the promotion of reliability may also pose a challenge given that Energy Forward does not currently assess reliability as part of its criteria. Figure 7 highlights consumer ratings of characteristics important to their decision-making.

Figure 7. Importance of Characteristics in Purchasing Decisions



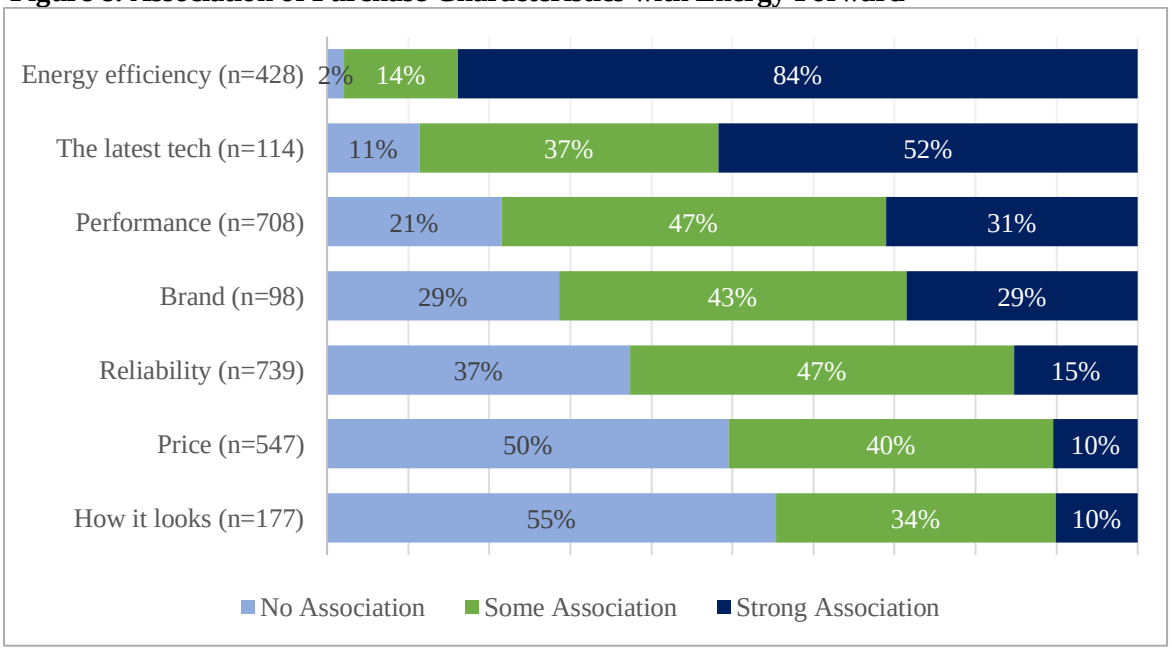
Notes: Result of survey question *F1: Please tell us, in general, how important each of the following characteristics is to you when shopping for a new home appliance or home electronics.*
Total n reflects the number of respondents that chose to rate each characteristic.

[6] In this case, non-energy benefits refers to positive characteristics of a product that are not directly related to its energy consumption such as high reliability, good performance or low price.

Respondents were asked which of the characteristics that they felt were very important would they associate with Energy Forward. Energy efficiency is strongly associated with Energy Forward among those who think it is important, while price and appearance have very weak associations. The two characteristics that respondents found most important—reliability and performance—have some association with Energy Forward, although respondents were divided in their responses.

In particular, among Internet survey respondents who think that reliability is very important, those in rural areas (19%) are significantly more likely than those in urban areas (14%) to strongly associate reliability with Energy Forward.[7] Further, among Internet survey respondents who think that performance is very important, those in rural areas (36%) are significantly more likely than those in urban areas (30%) to strongly associate performance with Energy Forward.[8]

Figure 8. Association of Purchase Characteristics with Energy Forward



Notes: Result of survey question *A7: Which of these characteristics, if any, do you associate with Energy Forward based on what you know about it?*
Base: Those who said characteristic was very important when shopping for a new appliance or electronic.

4.3 ENERGY FORWARD FIT WITH OTHER NEEA INITIATIVES

4.3.1 PERCEIVED FIT

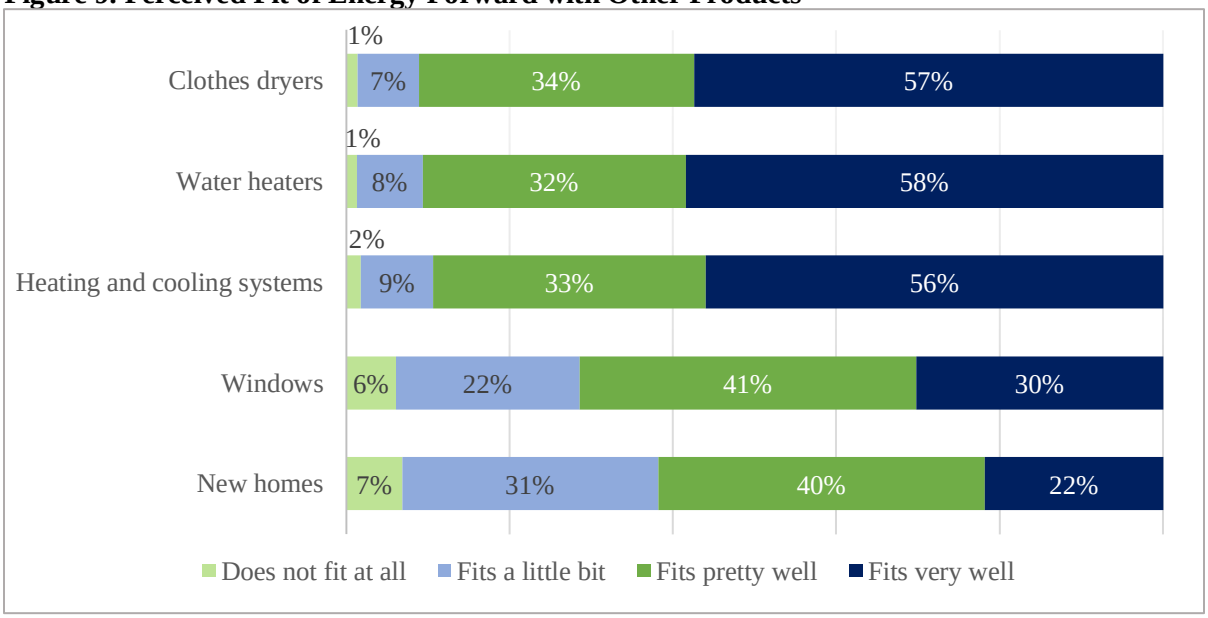
Results from both the online survey and the one-on-one interviews indicate that there is potential to apply the Energy Forward mark across the suite of NEEA's initiatives. The Internet survey tested how well respondents felt the Energy Forward mark fit with clothes dryers, water heaters,

[7] Results are significant to the 90% level.

[8] Ibid.

heating and cooling systems, windows, and new homes. Although the majority of respondents felt that the mark fit well with all of these products, perceived fit was stronger with clothes dryers, heating and cooling systems, and water heaters. This is likely the result of the fact that respondents can more easily associate the mark with equipment that directly consumes energy, as opposed to products that indirectly affect how much energy is consumed in the home. Figure 9 below contains the results of this fit assessment.

Figure 9. Perceived Fit of Energy Forward with Other Products



Notes: Result of survey question *F4: Currently the Energy Forward mark or logo is associated with televisions, but we want your opinion on whether it could be applied to other products. Please tell us how well you think it fits with each of the following items.*
Total n = 787.

Perceptions of fit differ somewhat by geographic region. In particular, consumers in urban areas are significantly more likely to say that Energy Forward fits pretty well with new homes and windows, compared with those in rural areas.

Table 13. Differences in Fit with Products by Region

Product	Does Not Fit at All		Fits a Little Bit		Fits Pretty Well		Fits Very Well	
	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural
Windows	5%	**10% ▲**	23%	22%	**43% ▲**	35%	29%	33%
New Homes	6%	**10% ▲**	31%	32%	**42% ▲**	32%	21%	25%
Heating and Cooling Systems	1%	3%	8%	10%	34%	32%	56%	55%
Clothes Dryers	1%	3%	7%	9%	35%	29%	57%	59%
Water Heaters	1%	3%	8%	9%	32%	32%	59%	57%

Notes: Result of survey question *F4: Currently the Energy Forward mark or logo is associated with televisions, but we want your opinion on whether it could be applied to other products. Please tell us how well you think it fits with each of the following items.*
▲indicates that value is significantly higher than other group (urban/rural) at the 90% confidence level.
Urban n = 401; Rural n = 386.

The one-on-one interviews complement these findings by suggesting that consumers can conceptually connect products that indirectly affect energy consumption to Energy Forward. More specifically, when discussed as part of a longer interview, consumers generally felt that Energy Forward could be applied to items such as new homes or windows. This may indicate that although the connection between some of the tested products and Energy Forward is less intuitive to consumers initially, they do not have a problem accepting the idea if they are given the proper context.

4.3.2 BARRIERS TO BRAND EXTENSION

Low awareness of Energy Forward is the main barrier to using it as an umbrella brand. This study further suggests that consumers' purchase behavior may pose additional challenges for NEEA in raising awareness of Energy Forward. In particular, consumers draw upon sources of product information that are national and therefore not easy for Energy Forward to utilize. For example, when researching products for purchase, consumers frequently look to Amazon.com reviews and *Consumer Reports* as opposed to local or regional resources.

In-store promotion through salespeople is also a potentially limited strategy for raising awareness. Respondents were divided on whether they sought out advice from salespeople when purchasing appliances or electronics. About half (49%) actively sought out salespeople for advice, more than a third (37%) actively avoid salespeople, and 14% are indifferent. The team explored whether any differences exist between people who look to or avoid salespeople, and there were none in terms of demographics or awareness of Energy Forward.

Table 14 presents more general information from the one-on-one interviews regarding where consumers look for information on energy efficiency when purchasing electronics and appliances.

Table 14. Sources of Information on Energy Efficient Products

Information Source	Percent of One-on-One Interview Respondents
Internet	63%
Consumer Reports	29%
Utility Company	26%
Retailer	17%
ENERGY STAR	11%
In-Store Labels	9%

Notes: Result of interview question *4-6: Can you think of any existing resources that you would look to for information on energy efficient appliances? What are they?*
Total n = 35.

4.4 LEVERAGING COEXISTING BRANDS

As part of this study, Opinion Dynamics explored a range of coexisting brands in the market to determine what alternatives, if any, NEEA might be able to leverage. The team worked directly with NEEA staff to develop the list of brands which is composed of ENERGY STAR, TopTen USA, It's a Good Place to Be, and Simple Steps, Smart Savings. The first two brands have a national presence, while the latter two are regional efforts sponsored by the Northwest utilities.

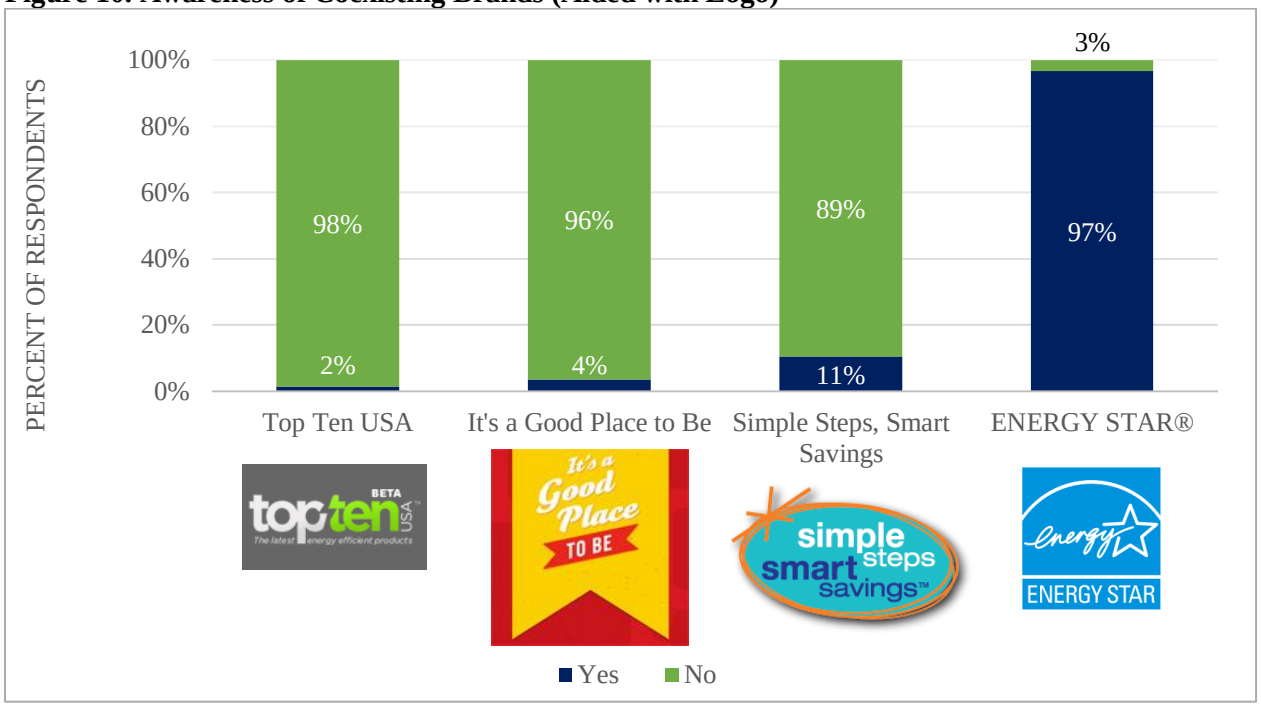
- ENERGY STAR**:** ENERGY STAR is a voluntary U.S. Environmental Protection Agency (EPA) program to identify and promote energy-efficient products and buildings.
- TopTen USA: TopTen USA identifies the best super-efficient consumer products and encourages their purchase.
- It's a Good Place to Be: The "It's a Good Place to Be" website is a central online location where utility customers can find out what residents across the Northwest are doing to cut energy waste in their homes.[9]
- Simple Steps, Smart Savings: The Simple Steps, Smart Savings promotion, offered by the Northwest utilities, offers residential consumers information about ways to reduce their energy usage, as well as special incentives on items such as compact fluorescent light bulbs (CFLs), light fixtures, and showerheads.

[9] It's a Good Place to Be is an initiative of the northwest utilities and NEEA.

4.4.1 AWARENESS AND PERCEPTION OF OTHER ENERGY EFFICIENCY-RELATED BRANDS AND CAMPAIGNS

Consistent with findings related to Energy Forward, awareness of coexisting brands is low both on name alone (Figure 2 above) and logo (Figure 10 below). ENERGY STAR and Simple Steps, Smart Savings got slight boosts in awareness when the team displayed their logos, while the awareness of TopTen USA and It's a Good Place to Be were consistent between name-only and logo-based aided-awareness questions.

Figure 10. Awareness of Coexisting Brands (Aided with Logo)



Notes: Result of survey question *C1: Please indicate whether you have seen any of the following logos.*
Total n = 787.

In order to further explore perceptions of coexisting brands, the team provided respondents with a brief description of each of the brands before asking what they associate with it and whether or not they had a favorable perception of it. As part of the first exercise, Opinion Dynamics asked Internet survey respondents to describe each brand using up to thirteen words provided by the team.[10] Figure 11 presents the results of this question. Key findings include the following:

- While the words energy and efficiency are near the top of each brand list, the percentage of respondents who associate energy and efficiency with ENERGY STAR is much higher than the percentage of respondents who associate these terms with TopTen USA, It's a Good Place to Be, and Simple Steps, Smart Savings.

[10] The thirteen words that the survey tested were: Energy, Efficiency, Technology, Home Improvement, Quality, Innovation, Televisions, Expensive, Reliable, Low Cost, Education, Savings, and Affordable.

- Although the results for ENERGY STAR and Energy Forward are generally similar, the terms "quality" and "reliable" are mentioned more frequently for ENERGY STAR, while the terms "technology" and "innovation" are mentioned more frequently for Energy Forward.

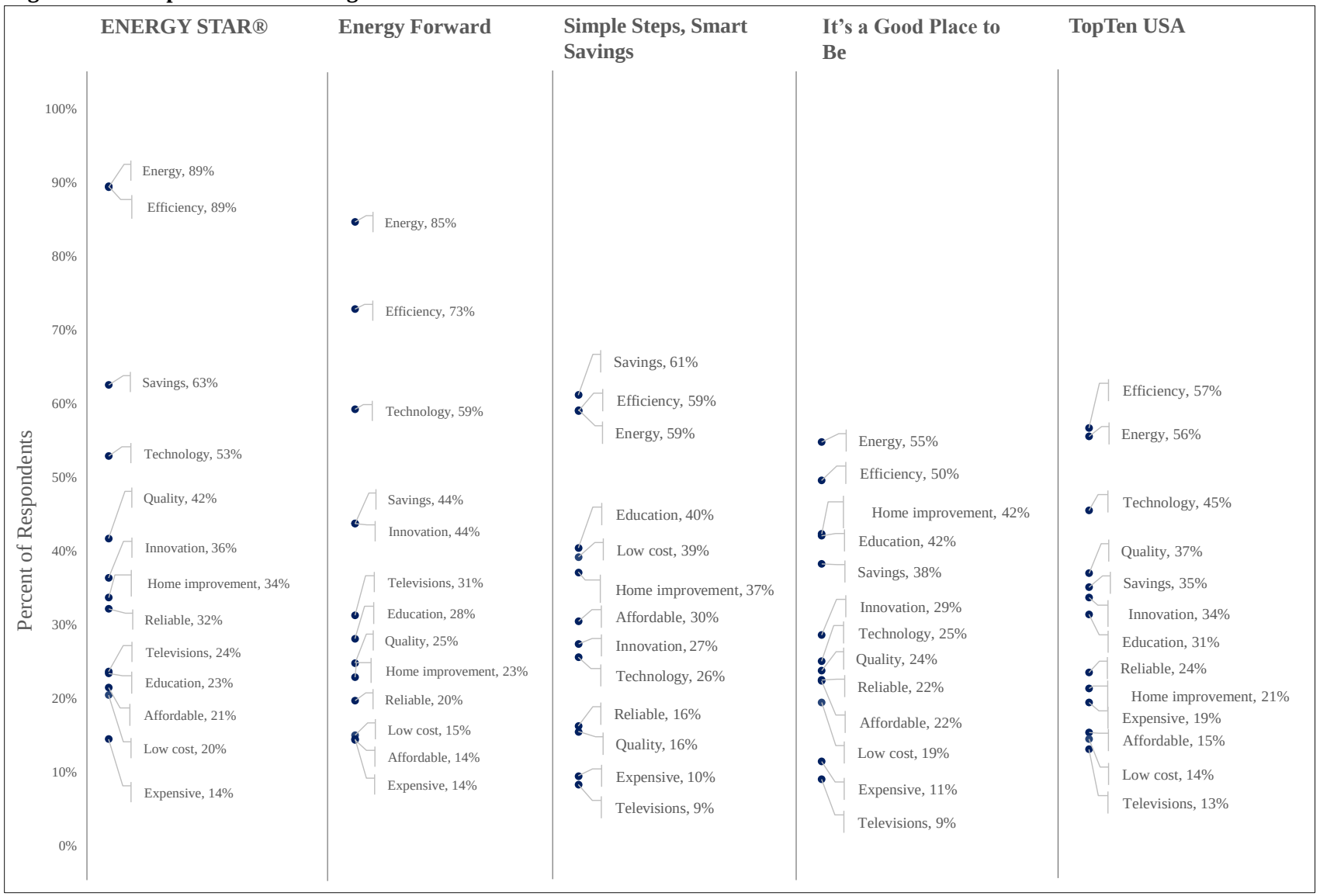
- There are distinct differences across each of the other brands.

    - For TopTen USA, the terms "technology" (45%) and "quality" (37%) are the most frequently mentioned after "efficiency" (57%) and "energy." (56%)

    - For It's a Good Place to Be, the terms "home improvement" (42%) and "education" (42%) are the most frequently mentioned after "energy" (55%) and "efficiency." (50%)

    - Simple Steps, Smart Savings stands out from all of the other brands in having the term "savings" (61%) mentioned the most frequently and slightly more frequently than "energy" (59%) and "efficiency." (59%) The term "low cost" is also mentioned by more than a third of respondents (39%).

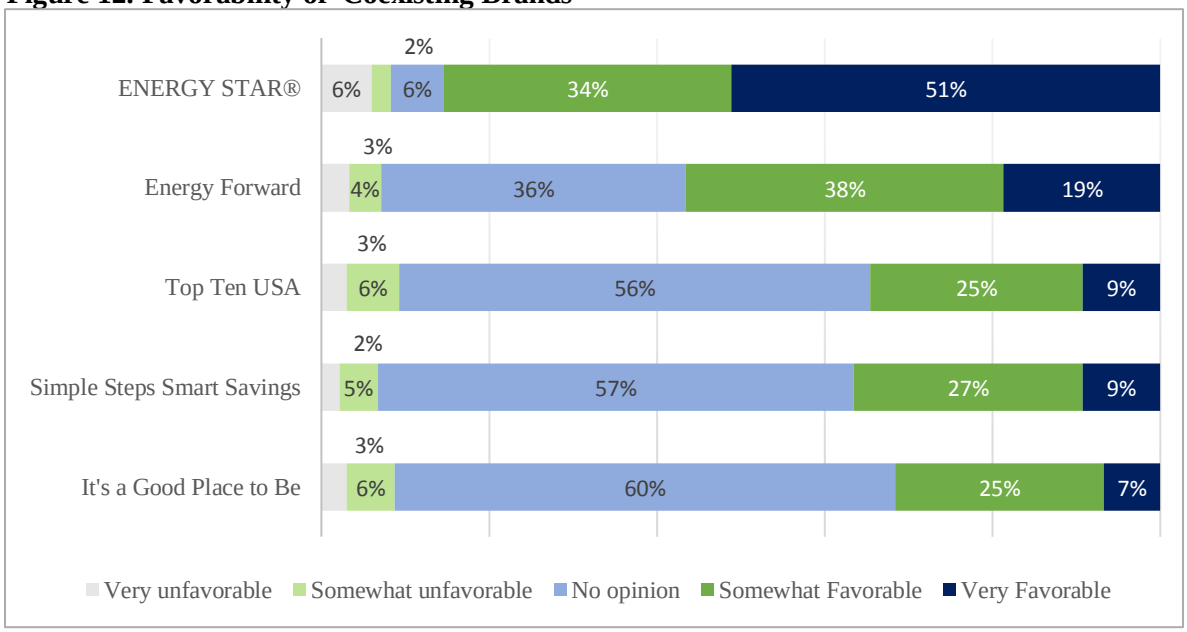
Figure 11. Perceptions of Coexisting Brands



Notes: Result of survey question *C4: Please select the words that you think describe the brand.*
Total n = 787.

Respondents then provided their opinion of each brand in terms of its favorability. Notably, even after reading a description, the majority of Internet survey respondents had no opinion of TopTen USA, It's a Good Place to Be, or Simple Steps, Smart Savings. In contrast, the majority of respondents felt "very favorable" (19%) or "somewhat favorable" (38%) about Energy Forward, and more than half (51%) felt "very favorable" about ENERGY STAR. Very few respondents held unfavorable opinions about any of the brands included in the study.

Figure 12. Favorability of Coexisting Brands



Notes: Result of survey question *C5: Based on what you know about the following brands, do you have a very favorable, somewhat favorable, somewhat unfavorable, or a very unfavorable opinion of each?*
Total n = 787.

4.4.2 CHALLENGES AND OPPORTUNITIES IN LEVERAGING COEXISTING BRANDS

As findings from this study indicate, none of the coexisting brands in the region could serve as an effective parent brand for NEEA. Awareness of these brands is universally low, and consumers have little knowledge of what they stand for or provide. Among coexisting national brands, only ENERGY STAR has high levels of awareness among consumers in Oregon, Washington, Idaho, and Montana, and a strong connection to energy efficiency. The dominance of ENERGY STAR serves as both a potential challenge and opportunity.

A common theme throughout the one-on-one interviews was a confusion about the relationship between ENERGY STAR and Energy Forward. Respondents often confused the two as being the same initiative, as illustrated in the following quote from one respondent:

> *"[Energy Forward] seems like it is part of ENERGY STAR. Is it a separate program from it, or is it just a new logo for ENERGY STAR? I am not sure how the two relate to each other."*

Furthermore, the phrase "Engineered to be the best of ENERGY STAR" created some confusion among respondents. In particular, some questioned the details of how the product was

"engineered," while others were confused by the idea that some ENERGY STAR-rated products were better than others. As one respondent put it:

> *"...it says 'Engineered to be the best of ENERGY STAR. That implies that there is something that is the worst of ENERGY STAR. And that doesn't make any sense."*

Others in the industry have documented issues related to consumer awareness of efficient product options. In particular, an April 2013 article by E Source points out that the challenge of educating consumers about different levels or tiers of efficiency affects a number of brands, from ENERGY STAR to TopTen USA (E Source 2013). As a result, while there is an incredible amount of information available to consumers about energy efficiency, they do not have a solid understanding of their options or even which actions have the potential to save them the most energy (Attari et al. 2010). This means that while there are established energy efficiency brands in the marketplace, there is an opportunity to educate consumers on how to save.

However, regardless of confusion about efficiency levels, consumers understand and trust ENERGY STAR as a source of information about energy-efficient products. Given that Energy Forward is in its infancy, applying the brand across NEEA's initiatives is possible, but only in conjunction with ENERGY STAR, at least in the short term.

5. CONCLUSIONS AND RECOMMENDATIONS

This study has two key conclusions with associated recommendations.

- **Energy Forward does not currently communicate advanced technology or a sense of "staying ahead of the curve."**

  Consumers noted key themes related to saving energy, saving money, and helping the environment or "being Green" when looking at the Energy Forward logo. Only eight percent of consumers mentioned the latest technology or state-of-the-art equipment when asked about associations unaided. Similarly, when promoted, less than a third of consumers thought the Energy Forward logo conveyed notions of "most technologically advanced."

  Residential consumers value reliability and performance most highly when making decisions about which appliances or home electronics to buy. While advanced technology may be an inherent aspect of both characteristics, only 15% of consumers said "the latest technology" was very important in shopping for new appliances or electronics. As a result, messaging around advanced technology is not critical, as customers do not list that as an important characteristic when selecting appliances or electronics.

  - ***Recommendation: Consider changes to Energy Forward messaging if it is used as an umbrella brand in the future.*** This would broaden the appeal of the brand to consumers interested in other non-energy benefits.

- **Energy Forward can serve as an umbrella brand for NEEA's initiatives.**

  There is no other viable parent brand in the market. Awareness of other regional brands such as Simple Steps, Smart Savings and It's a Good Place to Be are low, and consumers are undecided in their opinion of these brands. As a result, attempting to partner with or leverage one of these brands is not an optimal strategy for creating a unified brand identify or simplifying customer-facing messaging.

  Low awareness and weak associations provide NEEA with a blank slate from which to develop a single brand. Unlike long-standing brands that can find it challenging to move beyond tightly held associations, NEEA has the opportunity to establish an umbrella brand as way to tell consumers in the region *how* to save energy. However, low awareness of Energy Forward is also a potential barrier to success. As a result, developing a brand identity that is salient and leads to deep and broad awareness over time is critical.

  In general, Energy Forward fits well with all of NEEA's initiatives. Over half of residential consumers feel the mark fits very well with clothes dryers, water heaters, and heating and cooling systems. One-on-one interview findings show that the fit between Energy Forward and appliances is more intuitive for consumers compared to items such as windows or new homes. However, these interviews also revealed that as long as the individual is thinking of energy efficiency in a broad sense, they are able to make the

connection between the mark and a wide range of products, including new homes and windows.

Energy Forward needs to establish consumer trust if individuals are going to respond to messaging and calls-to-action. Currently, the presence of the ENERGY STAR logo provides Energy Forward with meaning and a connection to energy efficiency due to its resonance with the general population. Consumers know and value ENERGY STAR, and as a result, it has the potential to help Energy Forward establish credibility in the short term.

- ***Recommendation: Establish an internal team to revisit the Energy Forward mark, the idea and identity behind it, as desired associations for the brand if NEEA chooses to use the mark more broadly.*** The Energy Forward mark was initially developed for a particular programmatic purpose. In order to use the brand as an umbrella for NEEA's various initiatives, NEEA must determine what changes are needed to the underlying brand idea.

- ***Recommendation: In the short term, continue to leverage the partnership with ENERGY STAR.*** Given that consumers know so little about Energy Forward, it is critical to provide an indicator that the brand can be trusted. ENERGY STAR is a logical choice, given its existing relationship with Energy Forward and the co-branding taking place.

A. APPENDIX: REFERENCES

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B. APPENDIX: INTERNET PANEL INSTRUMENT

NEEA Energy Forward Consumer Messaging Study

Internet Panel Survey

FINAL – August 27, 2013

Reviewer Note: This is an Internet survey for adult residents of Washington, Oregon, Idaho, and Montana. The goal of the survey is to gather information on awareness and perceptions of the Energy Forward mark, awareness of other coexisting or competing brands, and Energy Forward fit with other NEEA initiatives and associated products. This survey is designed to be approximately 10 minutes in length and will be fielded to 750 people.

Introduction

Thank you for agreeing to participate in this online survey. We value your time and feedback.

Please click NEXT to start the survey.

Screener

S1a. What is your level of involvement when purchasing major electronics such as televisions or computers for your household?
1. Full responsibility in deciding what to purchase
2. Shared responsibility in deciding what to purchase
3. No involvement in deciding what to purchase

S1b. What is your level of involvement when purchasing large appliances such as refrigerators or washing machines for your household?
1. Full responsibility in deciding what to purchase
2. Shared responsibility in deciding what to purchase
3. No involvement in deciding what to purchase

[IF S1a and b=3 THANK AND TERMINATE]

Purchase Criteria

F1. Please tell us, in general, how important each of the following characteristics is to you when shopping for a new home appliance or home electronics. [PROGRAMMING NOTE: DRAG AND DROP]

Reliability	Very Important
Energy Efficiency	Somewhat important
How it Looks	Not important
Price	
Brand	
The Latest Technology	
Performance	

Energy Forward Awareness

A1a. Thinking about the past year, have you heard of any brands, campaigns or initiatives that encourage people to save energy in your region?
1. Yes

2. No

[ASK IF A1A=1, ELSE SKIP TO A2]
A1b. What brands, campaigns or initiatives have you heard of in the last year that encourage people to save energy in your region? Please list up to 3 if you can.
00. Enter response in box below

A2. Please indicate whether you have heard of each of the following brands, campaigns or initiatives that encourage people to save energy in your region. [RANDOMIZE ORDER]

	Yes 1	No 2
A. ENERGY STAR®	☐	☐
B. Energy Forward	☐	☐
C. ENERGY SAVE IT (red herring)	☐	☐
D. ENERGY STAR "Most Efficient"	☐	☐
E. Simple Steps, Smart Savings ™	☐	☐
F. It's a Good Place To Be	☐	☐
G. TopTen USA	☐	☐

[ASK IF A2b=1]
A3. How familiar are you with the Energy Forward mark?

I have heard the name, but nothing else about it	I have heard a little bit about it	I know a little bit about it	I know a lot about it

A4a. Before taking this survey, had you seen this logo?

1. Yes
2. No

A4b. And what about this logo? Had you seen this before taking this survey?

1. Yes
2. No

A5. Please provide three words or phrases that come to mind when you look at this logo.

00. Enter response 1 in box below
00. Enter response 2 in box below
00. Enter response 3 in box below

A6. Using a scale from 1 to 7 where 1 is “does not express at all” and 7 is “strongly expresses”, how much do you think this logo expresses the following ideas? [ROTATE]

a. Most technologically advanced
b. Energy efficiency
c. Saving energy
d. Moving society forward

A7. The "Energy Forward" mark, represented by the logo below, points shoppers to the most energy efficient electronics on the market today. Energy Forward televisions are engineered to be the best of ENERGY STAR®. This initiative was created by the Northwest Energy Efficiency Alliance (NEEA) in partnership with Northwest utilities, ENERGY STAR® and select retailers.

Most efficient
Engineered to be the best of ENERGY STAR®

a. Based on this general description, do you have a very favorable, somewhat favorable, somewhat unfavorable opinion, or a very unfavorable opinion of Energy Forward?
1. Very favorable
2. Somewhat favorable
3. Somewhat unfavorable
4. Very unfavorable

Energy Forward Fit with Other NEEA Initiatives

Next we have some questions about how you decide which products to purchase for your home.

[SKIP TO F3 IF NO CHARACTERISTICS ARE VERY IMPORTANT IN F1]

F2. You said that [LIST ALL VERY IMPORTANT CHARACTERISTICS FROM F1] are very important to you when purchasing a new appliance or home electronics. Which of these characteristics, if any, do you associate with Energy Forward based on what you know about it?

Most efficient
Engineered to be the best of ENERGY STAR®

[CHAR1]	No Association	Some Association	Strong Association
[CHAR2]	No Association	Some Association	Strong Association
[CHAR3]	No Association	Some Association	Strong Association
[CHAR4]	No Association	Some Association	Strong Association
[CHAR5]	No Association	Some Association	Strong Association

[CHAR6]	No Association	Some Association	Strong Association
[CHAR7]	No Association	Some Association	Strong Association

[ASK IF ENERGY EFFICIENCY IS VERY IMPORTANT OR SOMEWHAT IMPORTANT]

F3. How do you evaluate the energy efficiency of appliances or electronics you are thinking about buying?
00. Enter response in box below
96. I do not evaluate it

[PROGRAMMER INSTRUCTION – PROGRAM A BIG MATRIX SIMILAR TO THE TABLE BELOW WHERE RESPONDENTS WOULD SEE THE ENERGY FORWARD LABEL AND A PICTURE OF EACH OF THE PRODUCTS]

F4. Currently the Energy Forward mark or logo is associated with televisions, but we want your opinion on whether it could be applied to other products. Please tell us how well you think it fits with each of the following items. [ROTATE]

	Does not fit at all	Fits a little bit	Fits pretty well	Fits very well
A. Heating and cooling systems	☐	☐	☐	☐	☐
B. Clothes dryers	☐	☐	☐	☐	☐
C. New homes	☐	☐	☐	☐	☐
D. Water heaters	☐	☐	☐	☐	☐
E. Windows	☐	☐	☐	☐	☐

[ASK IF ANY F4A=1, ELSE SKIP TO F5b]

F5a. You mentioned that Energy Forward does not fit with heating and cooling systems. Why do you think that?

00. Enter response in the box below

[ASK IF ANY F4B=1, ELSE SKIP TO F5c]

F5b. You mentioned that Energy Forward does not fit with clothes dryers. Why do you think that?

00. Enter response in the box below

[ASK IF ANY F4C=1, ELSE SKIP TO F5d]

F5c. You mentioned that Energy Forward does not fit with new homes. Why do you think that?

00. Enter response in the box below

[ASK IF ANY F4D=1, ELSE SKIP TO F5e]

F5d. You mentioned that Energy Forward does not fit with water heaters. Why do you think that?

00. Enter response in the box below

[ASK IF ANY F4E=1, ELSE SKIP TO F6]

F5e. You mentioned that Energy Forward does not fit with windows. Why do you think that?

00. Enter response in the box below

F6. In general, do you think it makes sense to use Energy Forward to educate consumers about a range of products?

1. Yes
2. No

[ASK IF F6=2]

F7. Why not?

Coexisting Brands

C1. Please indicate whether you have seen any of the following logos. [ROTATE]

		Yes 1	No 2
A	ENERGY STAR	☐	☐

		Yes 1	No 2
B		☐	☐
C		☐	☐
D		☐	☐

[ASK IF C1a=1]
C2a. How familiar are you with ENERGY STAR?

I have heard the name, but nothing else about it	I have heard a little bit about it	I know a little bit about it	I know a lot about it

[ASK IF C1b=1]
C2b. How familiar are you with TopTen USA?

I have heard the name, but nothing else about it	I have heard a little bit about it	I know a little bit about it	I know a lot about it

[ASK IF C1c=1]
C2c. How familiar are you with It's a Good Place To Be?

I have heard the name, but nothing else about it	I have heard a little bit about it	I know a little bit about it	I know a lot about it

[ASK IF C1d=1]
C2d. How familiar are you with Simple Steps, Smart Savings?

I have heard the name, but nothing else about it	I have heard a little bit about it	I know a little bit about it	I know a lot about it

C3. Have you considered any of the following brands when making decisions about energy saving upgrades to your home in the past? [ROTATE]

[PROGRAMMER INSTRUCTION – PROGRAM A MATRIX SIMILAR TO THE TABLE BELOW WHERE RESPONDENTS WOULD SEE EACH NAME AND ASSOCIATED LOGO]

	Yes 1	No 2
A. [SKIP IF A2A=2 AND C1A=2] ENERGY STAR®	☐	☐
B. [SKIP IF A2B=2 AND A4=2] Energy Forward	☐	☐
C. [SKIP IF A2E=2 AND C1D=2] Simple Steps, Smart Savings ™	☐	☐
D. [SKIP IF A2F=2 AND C1C=2] It's a Good Place To Be	☐	☐
E. [SKIP IF A2G=2 AND C1B=2] TopTen USA	☐	☐

Before answering the next set of questions, please review the images and descriptions below.

[PROGRAMMER INSTRUCTION – PROGRAM A MATRIX SIMILAR TO THE TABLE BELOW WHERE RESPONDENTS WOULD SEE EACH LABEL AND THE ACCOMPANYING DESCRIPTION]

Brand	Description
energy ENERGY STAR	ENERGY STAR is a voluntary U.S. Environmental Protection Agency (EPA) program to identify and promote energy-efficient products and buildings.
BETA topten USA The latest energy efficient products	TopTen USA identifies the best super-efficient consumer products and encourages their purchase.
Most efficient Engineered to be the best of ENERGY STAR® ENERGY STAR	Created by the Northwest Energy Efficiency Alliance (NEEA) in partnership with Northwest utilities, ENERGY STAR® and select retailers, the "Energy Forward" mark or logo points shoppers to the most energy efficient electronics on the market today. Energy Forward televisions are engineered to be the best of ENERGY STAR®.

Brand	Description
	The "It's a Good Place to Be" web site is a central online location where utility customers can find out what residents across the Northwest are doing to cut energy waste in their homes.
	This promotion, offered by the Northwest utilities, offers residential consumers information about ways to reduce their energy usage, as well as special incentives on items such as Compact Fluorescent Light bulbs (CFLs), light fixtures, and showerheads.

C4. The box below contains a number of words that could be used to describe a brand. Please drag the words that you think describe each of the brands on the right into the box for that brand. You can use as many words as you want for each brand, and you can use the words more than once. [ROTATE BRAND LIST ON RIGHT]

Energy Efficiency Technology Home improvement Quality Innovation Televisions Expensive Reliable Low cost Education Savings Affordable	ENERGY STAR®
	Energy Forward
	Simple Steps, Smart Savings ™
	It's a Good Place To Be
	TopTen USA

C5. Based on what you know about the following brands, do you have a very favorable, somewhat favorable, somewhat unfavorable, or a very unfavorable opinion of each? [ASK FOR EACH A-E] [ROTATE]

A. ENERGY STAR®	Very unfavorable	Somewhat unfavorable	No opinion	Somewhat favorable	Very favorable
B. Energy Forward	Very unfavorable	Somewhat unfavorable	No opinion	Somewhat favorable	Very favorable
C. Simple Steps, Smart Savings ™	Very unfavorable	Somewhat unfavorable	No opinion	Somewhat favorable	Very favorable
D. It's a Good Place To Be	Very unfavorable	Somewhat unfavorable	No opinion	Somewhat favorable	Very favorable
E. TopTen USA	Very unfavorable	Somewhat unfavorable	No opinion	Somewhat favorable	Very favorable

Demographics

D1. Do you rent or own your home?
1. Rent
2. Own
00. (Other, Specify)

D2. Which of the following best describes your home?
1. Single Family Detached Home (No common walls)
2. Single Family Attached Home (Townhouse or Duplex)
3. Condominium
4. Apartment
5. Other, specify

D3. How long have you lived in this home?
1. Less than 1 year
2. 1-3 years
3. 4-10 years
4. 11-20 years
5. More than 20 years

D4. What is the approximate age of your home in years?
00. Enter response in the box below
8. Don't know

D5. What is the primary heating source for your home?
1. Electric
2. Gas
3. Propane
4. Wood
5. Oil

D6a. Within the past year, have you purchased a new home?
1. Yes
2. No

[SKIP IF D6A<>2]
D6b. Are you currently in the market for a new home?
1. Yes
2. No

D7a. Have you purchased a new television within the past year?
1. Yes
2. No

[ASK IF D7a=2]
D7b. Are you currently in the market for a new television?
1. Yes
2. No

Those are all of the questions we have. Thank you again for participating in this survey.

C. APPENDIX: ONE-ON-ONE INTERVIEW GUIDE

NEEA Energy Forward Consumer Messaging Study

One-on-One Interview Guide

FINAL – October 17, 2013

Reviewer Note: This is an in-depth interview guide that will be administered to residential consumers in the northwest (Oregon, Washington, Idaho, and Montana). The goal of the interview is to gain insight into consumer awareness of the Energy Forward mark, as well as perceptions of the mark's potential fit with other NEEA initiatives. We are planning to conduct interviews with 40 consumers recruited from the Internet panel effort. All participants will receive an incentive of $50 for their time and effort.

The current version of the guide is designed with two target groups in mind: those aware of Energy Forward, and those who recently purchased a television. Each section of the guide indicates which respondents will receive which questions. Each respondent will be classified as a member of only one of these groups.

The following instrument is meant to serve as a guide to the interviewer, and may not necessarily be read verbatim.

Introduction

Welcome. Thank you for taking time out of your busy schedule to talk with me today.

My name is _____ and I work for Opinion Dynamics. We have been asked to conduct this one-on-one interview on behalf of the Northwest Energy Efficiency Alliance. For the next thirty minutes we are going to talk in a bit more detail about some of the ideas from the survey that you took a few weeks ago. I will also be sharing some additional images with you as we talk.

I also want to let you know that to help with note taking and to ensure the interview goes smoothly, we will be recording our discussion. However, your name will not be associated or reported in the findings, and everything you say will be completely anonymous. Once we complete the interview, I'll confirm your mailing address so that we can process and send you the $50 incentive.

Let's get started.

Energy Forward Associations

Target Group: All respondents

Section Goal: Determine what people associate with Energy Forward.

Analysis: Examine responses and reactions to the brand to identify whether the mark could generate new associations.

1. When I use the term "Energy Forward", what comes to mind? [Interviewer to reference consumer response to the survey and probe]

[SHOW FULL ENERGY FORWARD MARK WITH TEXT]

2. We asked for your reaction to this logo in the survey that you took, but I would like to get your thoughts on what this image conveys to you. Do you see it as…?
    - A logo
    - An endorsement
    - An advertisement
    - A source of information

Perceptions of Energy Forward among those Aware

Target Group: Those aware of Energy Forward

Section Goal: Explore true awareness of the mark, as well as what it may be confused with.

Analysis: Examine responses and reactions to the mark in a real world setting. Findings will be examined in conjunction with the Internet Panel.

1. You mentioned in the survey that you [DESCRIBE LEVEL OF MARK AWARENESS]. Could you tell me more about where you saw this logo before you took the survey? [Probe for retail store, website, other advertising]
2. How frequently would you say you've seen the mark in the past six months?
3. When you first saw it, what did it mean to you? [Probe for associations, including with specific products]
4. What appeals to you about the Energy Forward mark? What does not appeal to you?

5. If you were considering purchasing a new appliance, would the presence of the Energy Forward mark motivate you to purchase it? What would it need to indicate to you to make you purchase the appliance?

6. Compared to other energy efficiency advertising you have heard or seen, is there anything confusing about the information provided by the Energy Forward mark? Do you have any recommendations for how to improve advertising about energy efficiency and the options available for consumers like you?

Exposure to Energy Forward among Recent TV Purchasers

Target Group: Those who purchased a TV in the past year.

Section Goal: Explore exposure to the mark, as well as other brands in the market.

Analysis: Examine responses and identify whether consumers recall Energy Forward from their shopping experience, as well as whether there are other dominant brands in the market conveying what consumers perceive to be similar information.

1. You indicated that you purchased a TV within the past year. What steps did you take to decide which TV to purchase? [Probe for: Steps in the whole buying experience including research, visiting the store in person or online, making the purchase]

2. What is the first brand, campaign or initiative that comes to mind when you think about how to identify energy efficient televisions?

1.
3. What brand, campaign or initiative is the most recognizable when you think about how to identify energy efficient televisions?

2.
4. How often have you seen this brand, campaign or initiative in the past six months? What about in the past month? [Probe for on TVs and also in any other places]

3.
5. What makes this brand, campaign or initiative more recognizable than other brands or logos that identify energy efficient televisions?

6. [IF NOT MENTIONED ABOVE] Did you see the Energy Forward mark when purchasing your TV? If so, did the salesperson talk with you about it?

7. [IF THEY SAW THE MARK] Did you understand what it was trying to tell you?

8. [IF THEY SAW THE MARK] What did the mark mean to you at the time? [Probe for change in meaning over time] If meaning has changed: What does the mark mean to you now?

9. What appeals to you about the Energy Forward mark? What does not appeal to you?

10. If you were considering purchasing a new appliance, would the presence of the Energy Forward mark motivate you to invest? What would it need to indicate to you to make you purchase the appliance?

11. Compared to other energy efficiency advertising you have heard or seen, is there anything confusing about the information provided by the Energy Forward mark? Do you have any recommendations for how to improve advertising about energy efficiency and the options available for consumers like you?

Perceived Fit with Other NEEA Initiatives

Target Group: All respondents

Section Goal: Determine how people perceive Energy Forward when linked to different NEEA initiatives.

Analysis: Examine responses and reactions to the mockups. Identify potential barriers to use of Energy Forward as an umbrella brand.

1. The image on your screen is meant to depict a consumer shopping for heating or cooling equipment at their local retailer. We would like you to describe what is taking place in this scenario. [IF NEEDED: What type of dialogue might be taking place and what actions might the consumer take to reach a decision about what to purchase?] [Probe for: reading information display, speaking to the sales person, research performed before getting to the store, etc.]

[IMAGE OF CONSUMER IN AN AISLE CONSIDERING EQUIPMENT]

Now I'm going to show you some ways that the Energy Forward mark might be used.

[SHOW MOCK-UP SLIDES, ROTATE PRODUCTS]

New home

Windows

Ductless heat pump

Clothes dryer

2. [ASK FOR EACH PRODUCT] What does it mean to you when you see the mark used in each of the following ways? What do you think it is trying to tell you? [Probe as necessary]
3. [ASK FOR EACH PRODUCT] Is having the mark on these products valuable to you? How/why is it valuable? If appropriate, why isn't it valuable? [Probe as necessary]
4. [ASK FOR EACH PRODUCT] What would make you trust Energy Forward when purchasing one of the products we just looked at? [Probe as necessary]
5. Is the Energy Forward mark more valuable on some products than on others? Why or why not?
6. Can you think of any existing resources that you would look to for information on energy efficient appliances? What are they? [Probe for any other brands or marks; probe for new homes]
7. What would be most helpful in helping you decide which energy efficient appliances or products to buy? What else does the mark need to provide to help you?
8. Are there any people or organizations that you would trust to provide this type of information? If so, which ones?

Closing

That concludes our interview.

To what address should I send your incentive check?

On behalf of the sponsors of Energy Forward, thank you for your time.