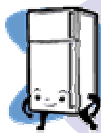


ENERGY STAR® Trends Across Time & Space



NH Add-on Sample Results

Lisa Glover, Unittel

June 16, 2005 CEE Evaluation Committee Meeting, Boston

Organization of Presentation

- Overview
- NH Compared to the Nation and Other High Publicity Areas
- Appliance Penetration
- Summary



Overview

- Statewide ENERGY STAR program started in 2002
- Results of this survey will be shared with our regulators and customers
- Over-sampled in 2001 and 2004
 - Sample Sizes: U.S., High-Publicity, NH
 - 2001: 1997, 1256, **278**
 - 2002: 1168, 580
 - 2003: 2676, 914
 - 2004: 1741, 949, **100**
- NH analysis done by NMR and differs from EPA

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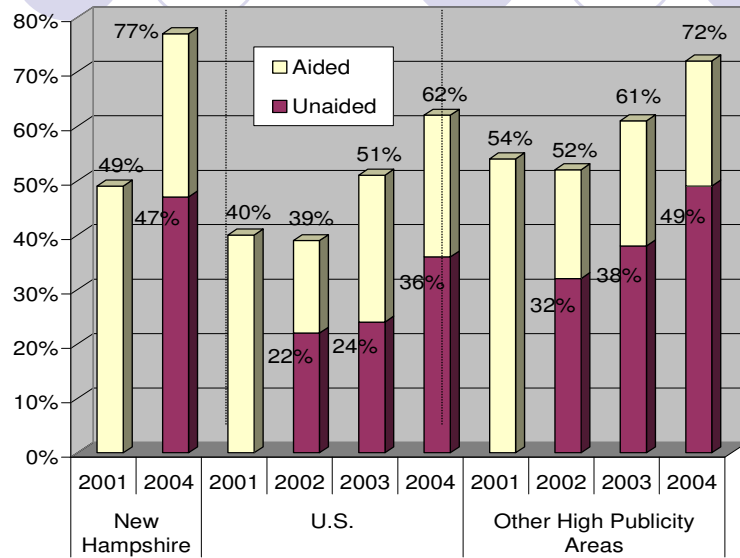


NH Compared to the Nation – Key Differences

- Recognition of the Energy Star label
- Understanding of the ENERGY STAR label
- Influence of the ENERGY STAR label
- Attitudes toward ENERGY STAR products
- Loyalty to the ENERGY STAR-labeled products

4

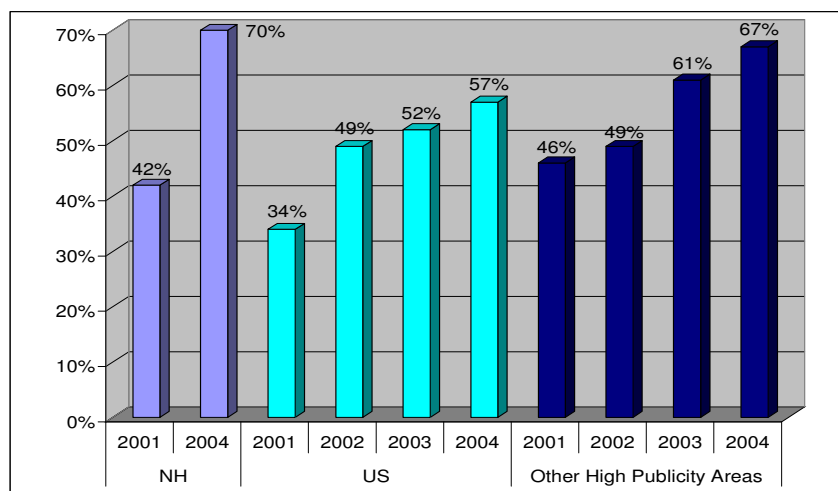
Recognition of the ENERGY STAR Label



5

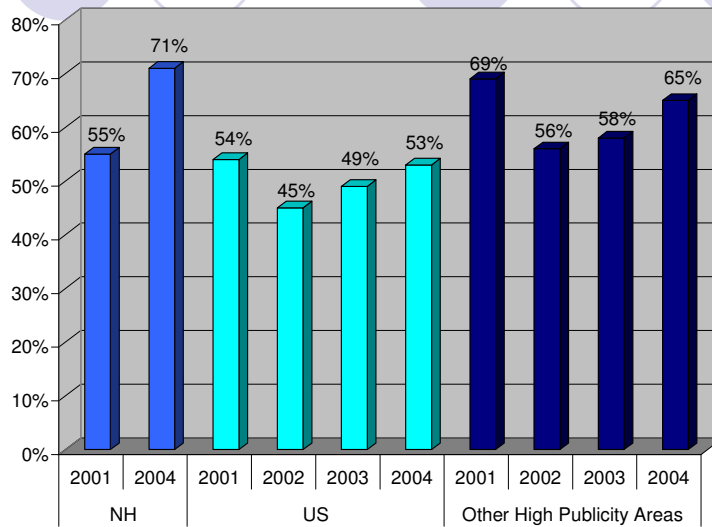
High Understanding

% of respondents with high understanding of ES label



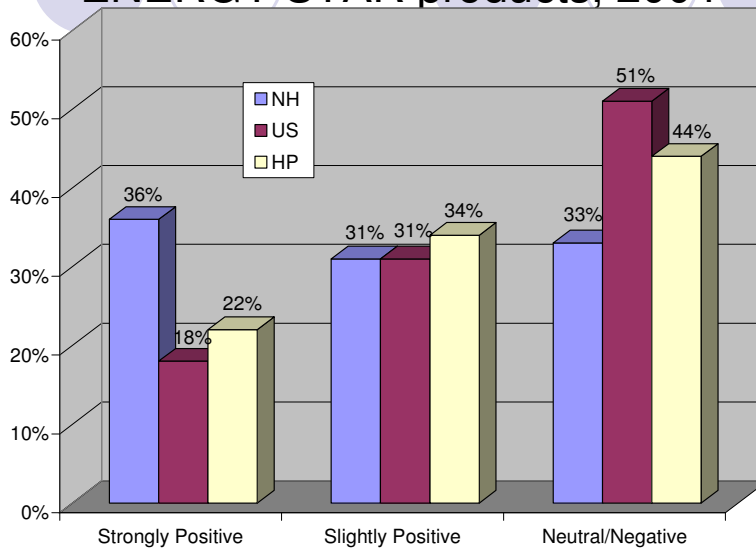
6

Influence of the ENERGY STAR Label % Very Much or Somewhat



7

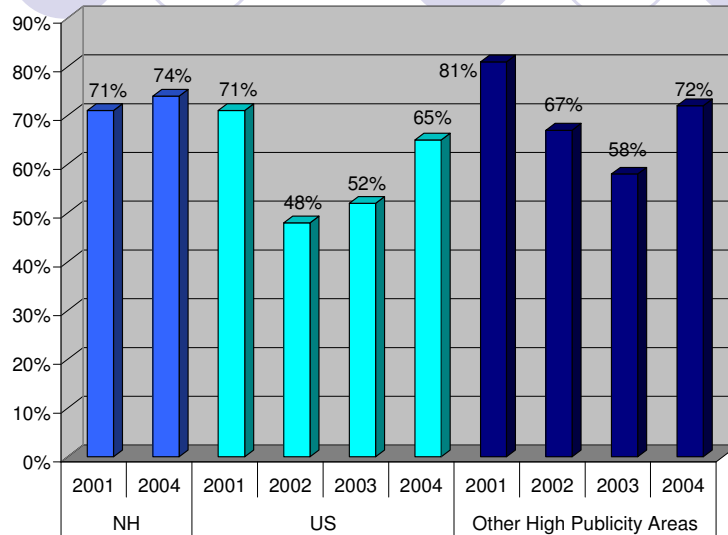
Overall Index of Attitudes towards ENERGY STAR products, 2004



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Likely to Recommend

% Very or Somewhat Likely



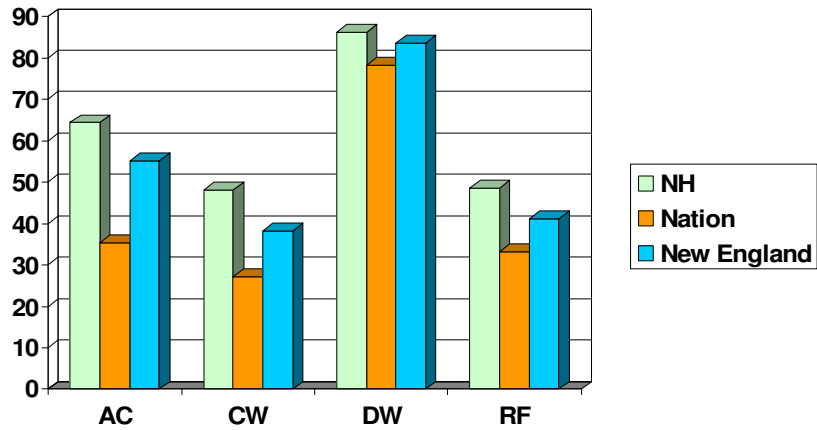
9

Appliance Penetration and ES Awareness

- High recognition of the ENERGY STAR label can be correlated with penetration of ENERGY STAR products.
- NH ENERGY STAR appliance program is leveraging behavior of NH consumers and contributing to the transformation of the appliance market in the state.
- NH benefits from programs in surrounding states (and we have no sales tax!).

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2004 D&R Appliance Penetration



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In Summary...NH compared to the Nation and Other HPA

- Higher recognition of the ENERGY STAR label
- Higher understanding of label
- More likely to be influenced by label
- More positive attitudes toward the label
- More likely to recommend ES-labeled products to a friend



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