



Overview of utility partner strategies and EPA resources

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Questionnaire Overview



- 4th annual questionnaire was sent in early January 2012.
- Questions focused on:
 - general program information and updates
 - incentives structures
 - marketing strategies
 - program cycles
 - specific support needs and/or feedback.
- Of the 123 utilities who received the questionnaire, 92 responded (75% response rate) and will remain active.

States with Sponsored Programs



39 states (78%) had active programs in 2011:

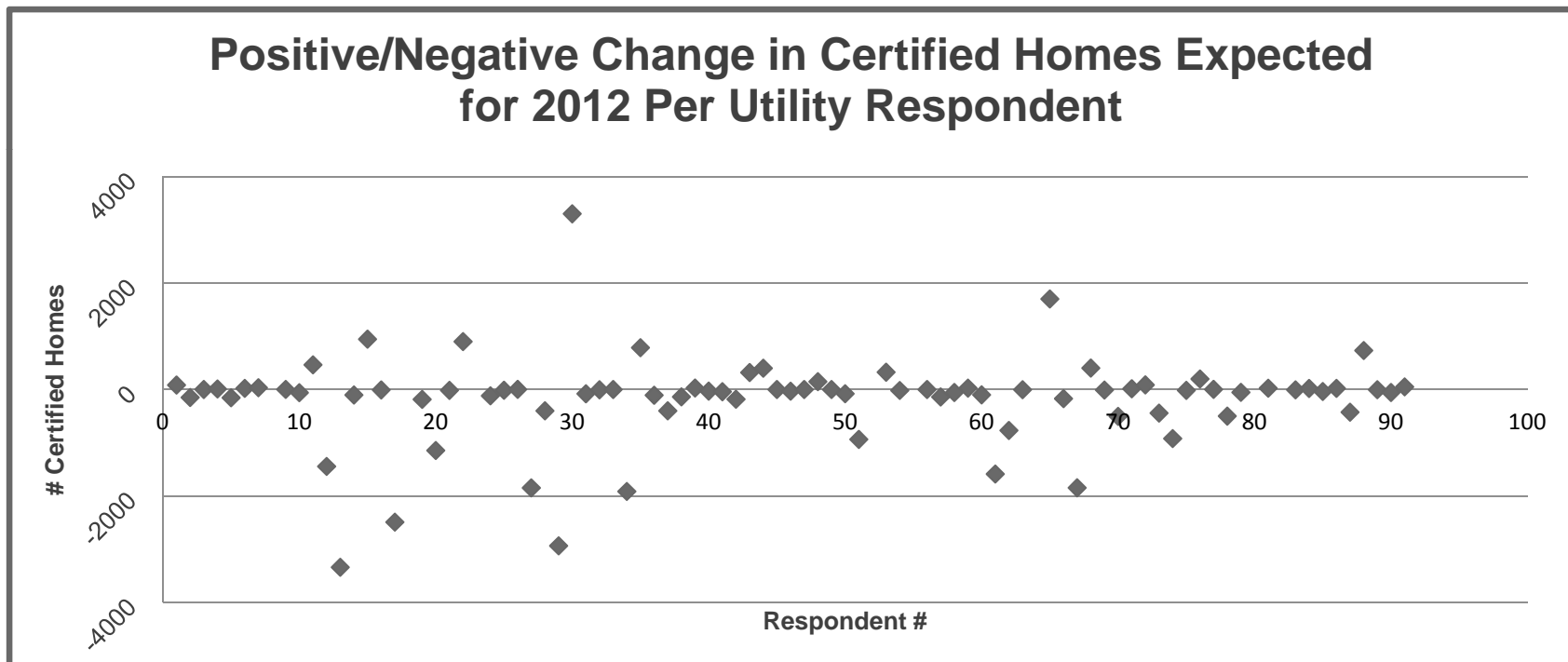
| | | |
|-------------|----------------|----------------|
| Alabama | Kansas | Ohio |
| Arizona | Kentucky | Oklahoma |
| Arkansas | Maryland | Oregon |
| California | Massachusetts | Rhode Island |
| Colorado | Michigan | South Carolina |
| Connecticut | Minnesota | Tennessee |
| Florida | Missouri | Texas |
| Georgia | Nebraska | Utah |
| Idaho | Nevada | Vermont |
| Illinois | New Hampshire | Virginia |
| Indiana | New Jersey | Washington |
| Iowa | New Mexico | Wisconsin |
| | New York | Wyoming |
| | North Carolina | |

Volume of ENERGY STAR Homes



Certified homes completed under a program in 2011:

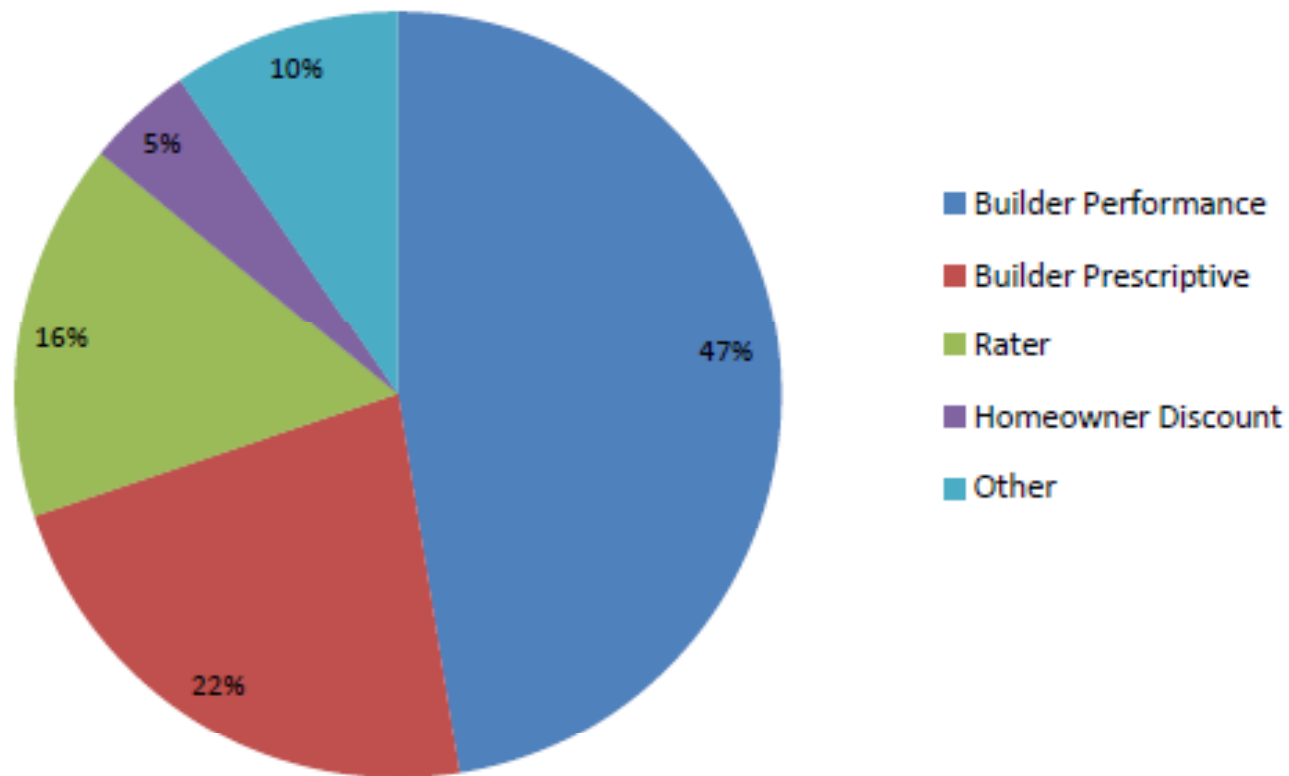
- Total homes reported: 64,864 (16% increase from 2010)
- Homes from top 20 Sponsors: 52,722 (81%)



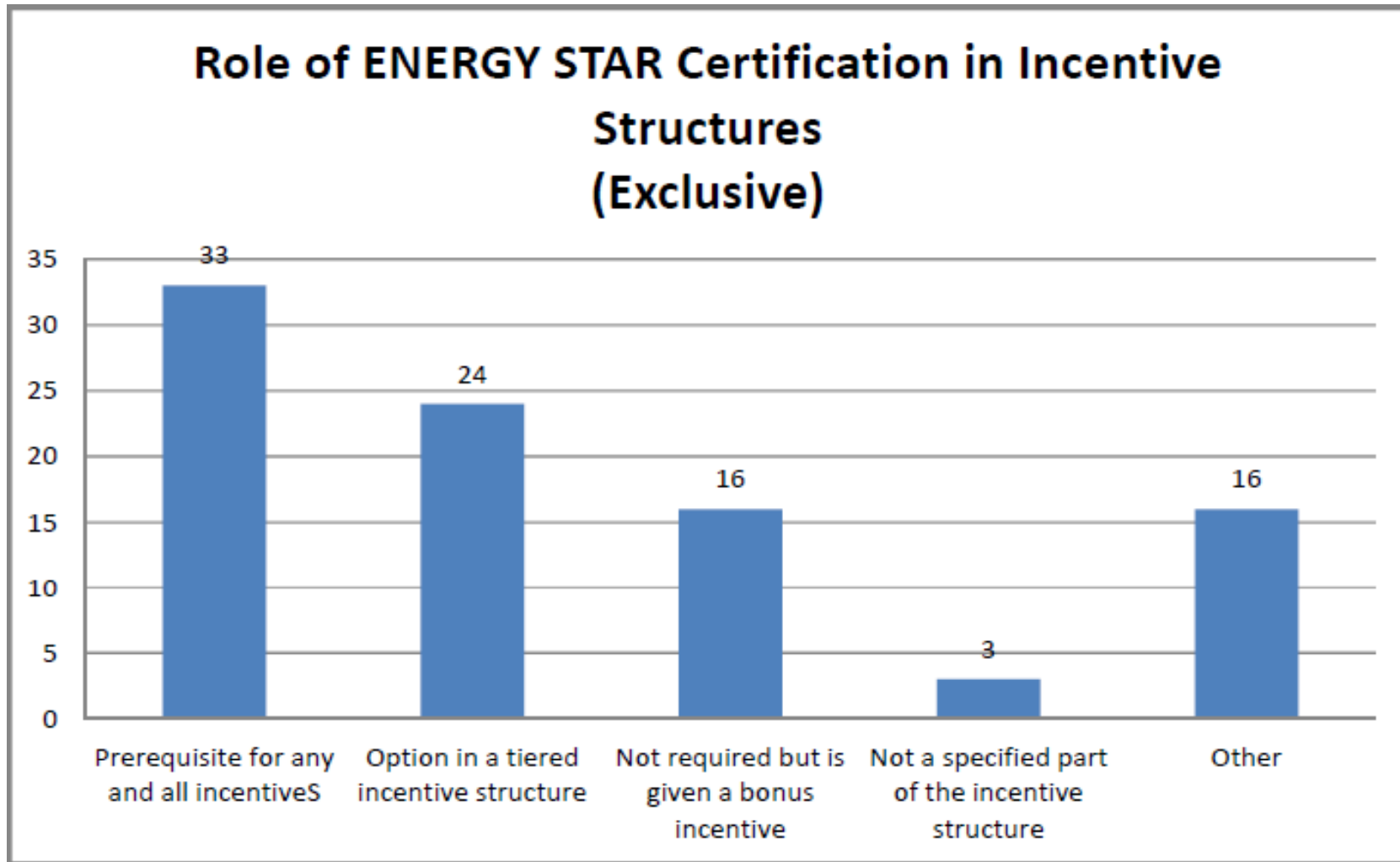
Incentive Structures



Incentive Comparison



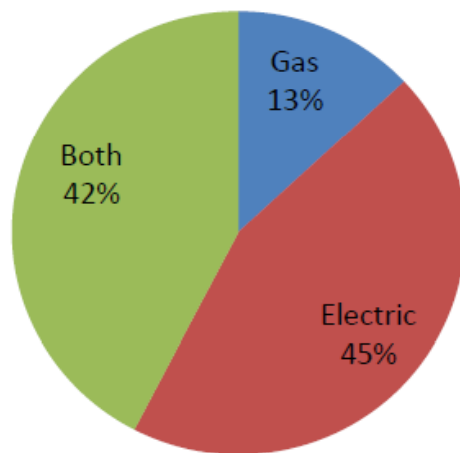
Incorporation of ENERGY STAR



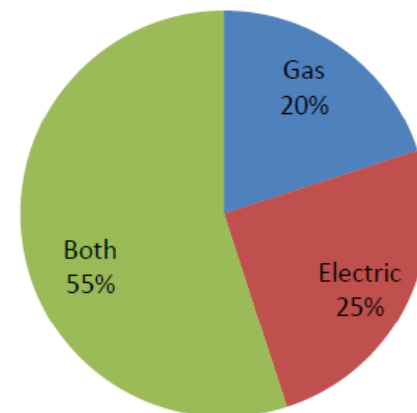
Energy Provision



Power Sources for All Respondents



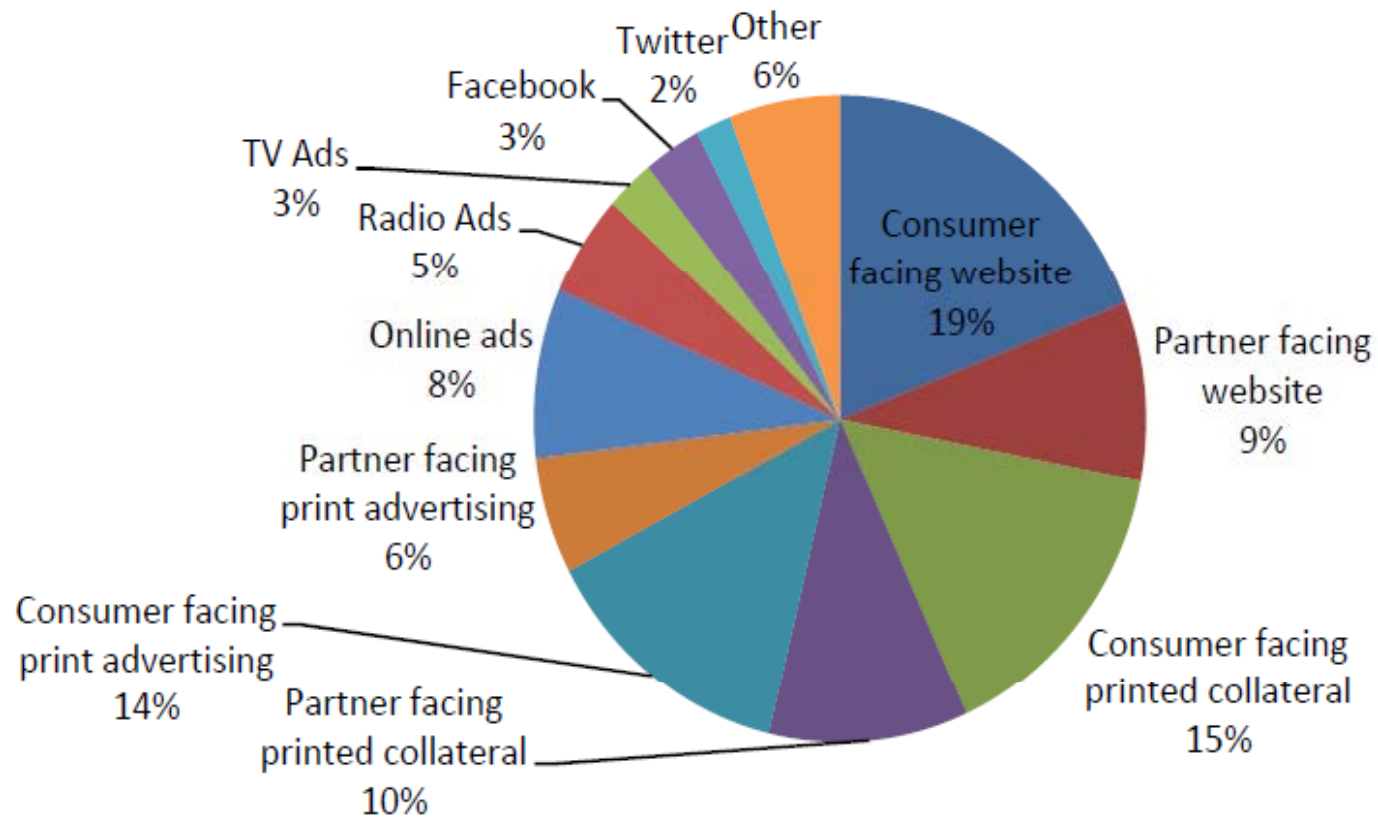
Power Sources of Top 20 Utilities Expected for 2012



Marketing Strategies



Comparison of Marketing & Outreach Tools Utilized by Respondents



Support Requested



- Training
 - List of national professional trainers to educate on building house as a system
 - Technical training presentation with supporting materials and handouts
 - Training materials for local appraisers and real estate professionals
- Marketing Support:
 - For consumers and program participants, including brochures
 - How to market V3, including breakdown of incremental costs and projected savings
- HVAC Support
 - QI Training for Contractors
 - Reducing cost of HVAC credential for contractors
- General Support
 - Video and audio versions of presentations
 - Program design review and best practices
 - State specific incremental costs and cost effectiveness calculations

Resources for Sponsors



- Programmatic Updates
 - Quarterly update emails for sponsors
 - Quarterly sponsor webinars
- Marketing Support
 - Marketing platform and pillars
 - Brochures for consumer and builder
 - Webinars on marketing/selling ENERGY STAR
- HVAC Support
 - Videos on HVAC Contractor Checklist
 - HVAC presentation and speaker notes for builders to recruit
 - New HVAC webinars
- General Support
 - Program design feedback
 - ENERGY STAR homes data for service state(s)