

Appendix

Residential Market Assessment for ENERGY STAR Windows in the Northeast

Prepared for:
Northeast Energy Efficiency Partnership

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recycled paper

NEEP Windows Retailer Study

ID No.	Date	
Windows Retailer Name		
Respondent Type:	<input type="checkbox"/> Participant	<input type="checkbox"/> Non-Participant
Contact Name	<input type="checkbox"/> Yes <input type="checkbox"/> No	Title ()
State	ENERGY STAR Partner	Phone

Retail/Wholesale Segment:

- Wholesaler
- Big Box/Home center store
- Window/Door specialty store
- Building materials/ Lumberyard
- Other [SPECIFY: _____]

Hello, my name is _____ and I'm calling on behalf of the Northeast Energy Efficiency Partnerships. [IF DON'T HAVE CONTACT, ASK FOR MARKETING MANAGER]

[IF NOT FAMILIAR WITH NEEP, READ]

Northeast Energy Efficiency Partnerships, Inc. (NEEP) is a non-profit regional organization founded in 1996. NEEP's mission is to steadily increase energy efficiency in homes, buildings, and industry throughout the Northeast region of the United States.

NEEP is currently conducting an assessment of the residential market for ENERGY STAR Windows in the Northeast and is hoping you may have a few minutes to share your observations of the changes in ENERGY STAR Windows market over the past few years. All of the information collected will be reported in the aggregate for retailers. Your company-specific information will remain confidential. Would you have a few minutes to speak now?

Screener Questions

1. Are you familiar with ENERGY STAR (energy efficient) windows products sold by your company?
 1. Yes [CONTINUE]
 2. No [ASK FOR PERSON WHO IS MORE FAMILIAR WITH ENERGY STAR WINDOWS]

2. Have you or anyone at your company participated in any of the NEEP-sponsored ENERGY STAR?
 1. Yes
 2. No
 3. Don't Know/Unfamiliar with trainings

3. I'd like to confirm that your store is a [SAY PROPOSED SEGMENT ABOVE]. Is that correct?
 1. Wholesaler
 2. Big Box/Home center store
 3. Window/Door specialty store
 4. Building Materials/ Lumberyard
 5. Or something else? [SPECIFY: _____]

4. How many stores does your company have in ...

_____ **New England** (Maine, Massachusetts, New Hampshire, Rhode Island, Connecticut, Vermont)
_____ **Mid-Atlantic** (New York, New Jersey, Pennsylvania, Maryland and Delaware)

Comment (big or small, wide-ranging or serve limited area, etc.)

Marketing Efforts

5. What percentage of your customers aware of the ENERGY STAR label?

1. All
2. Majority
3. About Half
4. Only Some
5. None

6. Which customers are typically aware of ENERGY STAR?

7. Why is this? How knowledge about ENERGY STAR are they?

8. Which customers are typically NOT aware of ENERGY STAR?

9. Why do you think that is?

10. Are all of your ENERGY STAR windows labeled with the appropriate climate zone ENERGY STAR label?

1. Yes [SKIP TO Q12]
2. No
3. Don't Know/Refused [SKIP TO Q12]

11. Why is that?

12. Do you utilize in-store point of purchase ENERGY STAR displays?

1. Yes
2. No (SKIP TO Q14)
3. Don't Know/Refused (SKIP TO Q14)

13. How effective do you believe the displays are at promoting ENERGY STAR?

1. Very Effective
2. Somewhat Effective
3. Neither Effective or Ineffective
4. Somewhat Ineffective
5. Not At All Effective

Comment:

14. Has your company changed the way it markets ENERGY STAR windows in the past three years?

1. Yes
2. No [SKIP TO Q16]
3. Don't Know/Refused [SKIP TO Q17]

15. How have your marketing efforts changed? (Probe for changes by distribution channel, state)

16. Why have you not made any changes to your approach?

17. What efforts have you found to be the most successful? [Probe for type of marketing programs, experiences, and use of ENERGY STAR symbol/branding]?

Distribution system

18. What percent of your windows come from the following sources...[READ LIST. If multiple answers, get a percentage breakdown. Confirm for wholesalers that they purchase direct from manufacturers. For regional managers attempt to get answers that represent all stores; For other respondents with multiple stores clarify if answers represent one store or all stores, and the climate zones for the stores]

- _____% Direct from Manufacturers
- _____% Millwork wholesalers
- _____% Wholesale retailers/Short line distributors
- _____% In-house manufacturing
- _____% Other (please describe)_____

 100% *Total should sum to 100%*

19. Has this distribution changed in the past three years?

1. Yes
2. No [SKIP TO Q11]
3. Don't Know/Refused [SKIP TO Q11]

20. Please explain why and how it has changed? (Probe for changes by distribution channel, state)

21. What percentage of your window sales go to...[READ LIST- For regional managers attempt to get answers that represent all stores; For other respondents with multiple stores clarify if answers represent one store or all stores, and the climate zones for the stores]

- ____% Builders for Residential New Construction Projects
- ____% Residential Professional Re-modelers (*Purchased and retrofitted by contractor*)
- ____% Retailer Installed Windows (*Purchased by homeowner, installed by retailer*)
- ____% Do-It-Yourselfers (*Purchased and installed by homeowners*)
- ____% Other (please describe, includes commercial) _____

100% Total should sum to 100%

Customer Interest

22. Have you seen a change in the interest by of any of these customers for ENERGY STAR windows in the three years?

1. Yes
 - a. ____ Builders for Residential New Construction Projects
 - b. ____ Residential Professional Re-modelers
 - c. ____ Retailer Installed Windows
 - d. ____ Do-It-Yourselfers
 - e. ____ Other
2. No [SKIP TO Q25]
3. Don't Know/Refused [SKIP TO Q25]

23. How has interest changed? (Probe for changes by state, etc.)

24. What do you think has caused this change in interest?

Training (PARTICIPANTS ONLY)

25. When did you participate in the _____ (insert NEEP training co-sponsor) ENERGY STAR sales training?

1. Last 2 – 3 months
2. 4 to 6 months ago
4. 7 months to a year ago
5. More than a year ago
6. Don't Know/Refused

26. How did you first learn about the training?

27. Why did you decide to attend?

28. What are the primary lessons you learned by participating?

29. How useful would you say the training overall was?

1. Not At All Useful
2. Somewhat Not Useful
3. Neither Useful or Not Useful
4. Somewhat Useful
5. Very Useful
6. Don't Know/Refused

30. Why do you say that?

31. Do you conduct any internal sales training for ENERGY STAR windows?

1. Yes
2. No [*Skip to Q33*]
3. Don't Know/Refused [*Skip to Q33*]

32. How does the _____ (insert NEEP training co-sponsor) ENERGY STAR sales training compare to your internal training? (Probe: Is it similar? Different? How so?)

33. How is the _____ (insert NEEP training co-sponsor) ENERGY STAR sales training utilized during your everyday business?

34. Has the training effected your....

	Yes	How?	No	Why Not?
Marketing Approach for ENERGY STAR				
Awareness/Knowledge of ENERGY STAR Windows				
Ability to Educate Consumers regarding ENERGY STAR				
Ability to Sell ENERGY STAR Windows				
Other - Specify:				

35. Would additional/follow-up training be helpful?

1. Yes
2. No *[Skip to Q37]*
3. Don't Know/Refused *[Skip to Q37]*

36. Please describe the form of additional or follow-up training that would be most useful for your company.

37. Do you have additional staff you would like to be trained?

1. Yes
2. No *[Skip to Q39]*
3. Don't Know/Refused *[Skip to Q39]*

38. Please describe your remaining needs for training? (Probe: More people? Different division of company? Other parts of country?)

39. Do you have any recommendations for future trainings? (Materials that should be added, existing material that should be emphasized or dropped, other parts of the country to serve, etc.)

Training – (NON-PARTICIPANTS ONLY)

40. Are you aware of the NEEP-sponsored training for retailers about ENERGY STAR windows?
1. Yes
 2. No [SKIP TO Q42]
 3. Don't Know/Refused [SKIP TO Q42]

41. Why did you decide not to attend?

42. Do you conduct any internal sales training for ENERGY STAR windows?
1. Yes
 2. No [*Skip to Q44*]
 3. Don't Know/Refused [*Skip to Q44*]

43. Please briefly describe the nature and content of the training. (Probe: All sales employees or just select people? How often? Length?)

44. How useful would you believe training on ENERGY STAR windows would be for your business?
1. Not At All Useful
 2. Somewhat Not Useful
 3. Neither Useful or Not Useful
 4. Somewhat Useful
 5. Very Useful

45. Why do you say that?

46. What type of information would be most useful for your business to have included in a training session on ENERGY STAR windows?

47. What is the best way to contact you regarding trainings in the future?

Sales/Penetration

48. Approximately, what percentage of your Northeast window sales in 2004 do you estimate were ENERGY STAR windows?
- New England _____
- Mid-Atlantic _____

49. Does that percentage differ for energy efficient glass doors and skylights?

1. Yes: Glass doors: _____ / Skylights: _____
2. No
3. Don't Know/Refused

Product	Northeast Sales of ENERGY STAR Qualifying Products in 2004	
	Percentage	Number of Units
Windows		
Glass Doors		
Skylights		

50. Has there any confusion about the new ENERGY STAR guidelines for skylights?

1. Yes
2. No [SKIP TO Q52]
3. Don't carry skylights [SKIP TO Q52]
4. Don't Know/Refused [SKIP TO Q52]

51. Could you please elaborate?

52. Do these estimates vary by state, distribution channel or some other factor?

1. MAINE – Comment: _____
2. NEW HAMPSHIRE – Comment: _____
3. VERMONT – Comment: _____
4. MASSACHUSETTS – Comment: _____
5. RHODE ISLAND – Comment: _____
6. CONNECTICUT – Comment: _____
7. NEW YORK – Comment: _____
8. NEW JERSEY – Comment: _____
9. Delaware – Comment: _____
10. Pennsylvania– Comment: _____
11. No Difference
12. Don't Know/Refused

53. How have these estimates changed over the past three years? [Specify by state, distribution channel, other]

54. What do you believe prompted this change? (Probe for changes by distribution channel, state)

55. What do you expect to happen in the next few years?

56. Is there any difference in availability between ENERGY STAR windows and standard windows (i.e. does it take longer to get ENERGY STAR qualifying windows?)
1. Yes
 2. No [Skip to Q58]
 3. Don't Know/Refused [Skip to Q58]

57. Please explain.

58. Is there any difference in sales of ENERGY STAR windows and standard windows for new construction and the remodel market?
1. Yes
 2. No [Skip to Q60]
 3. Don't Know/Refused [Skip to Q60]

59. Please explain.

Market Barriers

60. What do you think are the major barriers to the purchase and installation of ENERGY STAR windows by *builders and contractors*?

61. What do you think are the major barriers to the purchase and installation of ENERGY STAR windows *for consumers*?

62. What other barriers currently exist to the market transformation of ENERGY STAR windows?

63. Do these barriers vary by state, distribution type or any other factor? Please explain.

64. From your perspective, what needs to be done to address these barriers?

Incremental Cost

65. Roughly, what is the incremental cost for a customer to purchase an ENERGY STAR window instead of a standard window? (% or \$/square foot)

- _____ % More
- _____ % Less
- _____ Same

66. Has the incremental cost of ENERGY STAR windows over standard windows increased, decreased, or stayed the same in the last three years?

- 1. Increased
- 2. Decreased
- 3. Stayed the same
- 4. Don't Know/Refused

67. Why do you believe this is the case?

68. Any other comments on the topics we've discussed?

Thank you for your time

NEEP Windows Manufacturer Study

ID No.	Date	
Windows Manufacturer Name		
Contact Name	<input type="checkbox"/> Yes <input type="checkbox"/> No	Title ()
State	ENERGY STAR Partner	Phone

Hello, my name is _____, and I'm calling on behalf of the Northeast Energy Efficiency Partnerships. *[If don't have contact, ask for marketing manager.]*

[If not familiar with NEEP, read the following]

Northeast Energy Efficiency Partnerships, Inc. (NEEP) is a non-profit regional organization founded in 1996. NEEP's mission is to steadily increase energy efficiency in homes, buildings, and industry throughout the Northeast region of the United States.

NEEP is currently conducting an assessment of the residential market for ENERGY STAR Windows in the Northeast and is hoping you may have a few minutes to share your observations of the changes in ENERGY STAR Windows market over the past few years. All of the information collected will be reported in the aggregate for manufacturers. Your company-specific information will remain confidential. Do you have a few minutes to speak now?

[If "no," say the following] "What would be a better time for you this week? Or next?" [Repeat that the information is to help design an ENERGY STAR Windows program and that the findings will be shared with all participants]

1. Are you familiar with your company's ENERGY STAR windows products?
 1. Yes *[Continue]*
 2. No *[Ask for person who is more familiar with ENERGY STAR windows]*

2. Have you or has anyone at your company participated in any of the NEEP-sponsored ENERGY STAR trainings?
 1. Yes
 2. No
 3. Don't know/Unfamiliar with trainings

[ASK TO SPEAK WITH PERSON WHO PARTICIPATED IN TRAINING]

3. Approximately what percentage of your total window sales is in the New England and the Mid-Atlantic?
- _____ % of window sales in New England (*Maine, Massachusetts, New Hampshire, Rhode Island, Connecticut, Vermont*)
- _____ % of window sales in Mid-Atlantic (*New York, New Jersey, Pennsylvania, Maryland and Delaware*)
- _____ % of window sales elsewhere in U.S.
- _____ % of window sales international [*Do not read*]
- [If no sales in either New England or Mid-Atlantic, thank respondent and terminate]*

General Market Trends

4. What changes have you observed in the Northeast's (both New England and Mid-Atlantic) ENERGY STAR windows market in the past three years?
- _____
- _____
5. What factors prompted this change?
- _____
- _____
6. What changes do you expect in the next few years?
- _____
- _____
7. How do ENERGY STAR window products fit into your product line? [*Probe for mix of energy efficient vs. standard windows, most commonly manufactured window (glazing, materials, U-factor), etc.*]
- _____
- _____

Marketing Efforts for Energy Efficient Window Products

8. *Are you an ENERGY STAR partner?*
1. Yes
 2. No
 3. Don't Know/Refused
9. *Do you leverage the ENERGY STAR label and brand in your own marketing?*
1. Yes
 2. No [*Skip to Q11*]
 3. Don't Know/Don't Remember [*Skip to Q11*]

10. How so?

11. In the past three years, has your company made any changes to its marketing of ENERGY STAR windows?

- 1. Yes *[Skip to Q12]*
- 2. No
- 3. Don't Know/Refused

12. Why have you not changed you marketing practices for ENERGY STAR windows? *[Skip to Q14]*

13. What changes have you made? *[Probe for type of marketing programs, experiences, and use of ENERGY STAR symbol/branding]*

14. What have you found to be the most effective form of marketing ENERGY STAR windows?

Incremental Cost/Production Issues

15. Have the incremental costs of manufacturing ENERGY STAR qualified windows changed in the past three years?

- 1. Yes: Increase___/Decrease___
- 2. No: *[Skip to Q14]*
- 3. Don't Know/Refused *[Skip to Q14]*

16. What factors caused this change in the incremental costs?

17. Do you expect the incremental costs to change further in the next several years?

- Yes: Increase___/Decrease___
- No: *[Skip to Q19]*
- 999% = Don't Know/Refused *[Skip to Q19]*

18. Why do you expect this change?

Distribution Channels

19. What percentage of the windows you sell in the Northeast are sold to...

- _____ Millwork wholesalers
- _____ Big Box/Home center stores
- _____ Window/Door specialty stores
- _____ Lumberyards
- _____ Wholesale retailers/Short line distributors
- _____ OEM (manufactured housing producers)
- _____ Direct to builders
- _____ Direct to remodeling contractors
- _____ Direct to homeowners

[Total should sum to 100%]

20. Has this distribution of sales changed in the past three years?

- 1. Yes
- 2. No *[Skip to Q22]*
- 3. Don't Know/Refused *[Skip to Q22]*

21. Please explain why and how it has changed?

22. Does this distribution differ for ENERGY STAR windows?

- 1. Yes
- 2. No *[Skip to Q24]*
- 3. Don't Know/Refused *[Skip to Q24]*

23. Please explain difference.

24. Do you see any differences in the sales of ENERGY STAR windows versus standard windows by state, new construction vs. remodel, etc.? Please explain.

Barriers and Opportunities

25. For the builder/contractor market, how are awareness and acceptance of ENERGY STAR windows?

26. What do you think are the major barriers to the purchase and installation of ENERGY STAR windows by *builders and contractors*?

27. What do you think are the major barriers to the purchase and installation of ENERGY STAR windows *for consumers*?

28. What other barriers currently exist to the market transformation of ENERGY STAR windows?

29. Do these barriers vary by state, distribution type or any other factor? Please explain.

30. From your perspective, what needs to be done to address these barriers?

Use of the ENERGY STAR Label

31. What percentage of your ENERGY STAR qualifying windows products also include the ENERGY STAR label?

_____ % [*If 100%, skip to Q33*]
_____ 999% = Don't know/Refused

32. Why do you not use the ENERGY STAR labels on all of your energy efficient window products?

33. Has this percentage changed in the past three years?

1. Yes
2. No [*Skip to Q35*]

34. Why has this changed?

Training (PARTICIPANTS ONLY)

35. When did you participate in the _____ (insert NEEP training co-sponsor) ENERGY STAR sales training?

1. Last 2 – 3 months
2. 4 to 6 months ago
3. 7 months to a year ago
4. More than a year ago
5. Don't Know/Refused

36. How did you first learn about the training?

37. Why did you decide to attend?

38. What are the primary lessons you learned by participating?

39. How useful would you say the training overall was?

1. Not At All Useful
2. Somewhat Not Useful
3. Neither Useful or Not Useful
4. Somewhat Useful
5. Very Useful
6. Don't Know/Refused

40. Why do you say that?

41. Do you conduct any internal sales training for ENERGY STAR windows?

1. Yes
2. No [*Skip to Q43*]
3. Don't Know/Refused [*Skip to Q43*]

42. How does the _____ (insert NEEP training co-sponsor) ENERGY STAR sales training compare to your internal training? (Probe: Is it similar? Different? How so?)

43. How is the _____ (insert NEEP training co-sponsor) ENERGY STAR sales training utilized during your everyday business?

44. Has the training effected your....

	Yes	How?	No	Why Not?
Marketing Approach for ENERGY STAR				
Awareness/Knowledge of ENERGY STAR Windows				
Ability to Educate Retailers regarding ENERGY STAR				
Ability to Sell ENERGY STAR Windows				
Other - Specify:				

45. Would additional/follow-up training be helpful?

1. Yes
2. No *[Skip to Q47]*
3. Don't Know/Refused *[Skip to Q47]*

46. Please describe the form of additional or follow-up training that would be most useful for your company.

47. Do you have additional staff you would like to be trained?

1. Yes
2. No *[Skip to Q49]*
3. Don't Know/Refused *[Skip to Q49]*

48. Please describe your remaining needs for training? (Probe: More people? Different division of company? Other parts of country?)

49. Do you have any recommendations for future trainings? (Materials that should be added, existing material that should be emphasized or dropped, other parts of the country to serve, etc.)

Training – (NON-PARTICIPANTS ONLY)

50. Do you conduct any internal sales training for ENERGY STAR windows?

1. Yes
2. No [*Skip to Q52*]
3. Don't Know/Refused [*Skip to Q52*]

51. Please briefly describe the nature and content of the training. (Probe: All sales employees or just select people? How often? Length?)

52. How useful would you believe training on ENERGY STAR windows would be for your business?

1. Not At All Useful
2. Somewhat Not Useful
3. Neither Useful or Not Useful
4. Somewhat Useful
5. Very Useful

53. Why do you say that?

54. What type of information would be most useful for your business to have included in a training session on ENERGY STAR windows?

55. What is the best way to contact you regarding trainings in the future?

Sales of ENERGY STAR windows

56. Approximately, what percentage of your Northeast window sales in 2004 do you estimate were ENERGY STAR windows?

New England _____

Mid-Atlantic _____

57. What about with regard to glass door sales?

58. What about with regard to skylights?

Northeast Sales of ENERGY STAR Qualifying Products in 2004		
Product	Percentage	Number of Units
Windows		
Glass Doors		
Skylights		

59. Do these estimates vary by state, distribution channel, remodel vs. new construction, or some other factor?

60. How have these estimates changed over the past three years? [*Specify by state, distribution channel, other*]

61. What could a program do to help your sales of ENERGY STAR windows in the future?

62. Any other comments?

**NEEP Windows Study
Industry Expert Interview Instrument**

ID No.

Company Name

Date

Contact Name

Title

()

State

Phone

Hello, my name is _____, and I'm calling on behalf of the Northeast Energy Efficiency Partnerships.

[If not familiar with NEEP, read the following]

Northeast Energy Efficiency Partnerships, Inc. (NEEP) is a non-profit regional organization founded in 1996. NEEP's mission is to steadily increase energy efficiency in homes, buildings, and industry throughout the Northeast and Mid Atlantic region of the United States.

NEEP is currently conducting fenestration market research as part of a grant with the Department of Energy. Would you have a few minutes to speak now?

[If no then say] "What would be a better time for you this week? Or next?" [Repeat that the information is to help design an ENERGY STAR Windows program and that the findings will be shared with all participants]

Northeast: New England (Maine, Massachusetts, New Hampshire, Vermont, Connecticut, Rhode Island)

Mid-Atlantic: New York, New Jersey, Pennsylvania, Delaware and Maryland

1. How are you involved with the NEEP ENERGY STAR Windows initiative? ***[If not directly involved, ask about involvement with ENERGY STAR market]***

Market Trends

2. What changes have you observed in the Northeast's Energy Star windows market in the past three years?

3. What factors influenced this change?

4. What changes do you expect to see in the next few years?

5. *[If not mentioned above]* Have distribution channels changed?

6. *[If not mentioned above]* Has the concentration of manufacturers changed?

7. What percentage of the Northeast window sales in 2004 do you believe were Energy Star qualifying?

8. Is this different for skylights or doors?

9. From your perspective, has there been a change in the market penetration for ENERGY STAR windows in the past three years?

1. Yes -- -INCREASE_____/DECREASE_____ *[Probe for how much]*
2. No (Skip to Q11)
3. Don't Know

10. What do you believe prompted this change? *[Probe for changes by distribution channel, state]*

11. Why not?

12. What do you expect to happen in the next few years?

13. Do you see any differences in the sales of Energy Star windows versus standard windows by state? *[Probe also for production differences between the two Energy star climate zones regions because of the different ENERGY STAR requirements]. How has this changed in past 3 years?*

14. Do you see any differences in the sales of Energy Star windows versus standard windows between the various distribution channels, such as wholesalers, big box retailers, and window specialty stores? Please explain. *How has this changed in past 3 years?*

15. Do you see any differences in the sales of Energy Star windows versus standard windows between new construction versus replacement or remodel applications? Please explain. *How has this changed in past 3 years?*

16. Are there any building trends that will affect the market for ENERGY STAR windows in the future? *[Probe for how market transformation programs may help]*

17. Are windows being labeled and sold to the appropriate climate zone? *[Probe for how market transformation programs may help if there are issues]*

18. How would you characterize the marketing of Energy Star windows? *[Probe for labeling versus displays, probe for suggestions for improvement]*

19. Have you seen any changes in the past year or two in the industry's cost of producing high-efficiency windows compared to standard windows? Has the incremental cost increased, decreased, or stayed the same?

1. Increased
2. Decreased
3. Stayed the same
4. Don't know

[If increased or decreased ask]

20. What factors have caused this change in the incremental costs?

21. Do you expect the incremental costs to change further in the next five years?

22. Why do you expect this change? *[Probe for suggestions for improvement]*

NEEP Sponsored Trainings

23. Are you aware of the sales training on Energy Star windows, sponsored by *[state relevant funding sources]*?

24. How have these trainings been received by the industry? *[Probe for suggestions for improvement]*

25. What changes in the Northeast market can be attributed to the trainings?

Market Barriers

26. For the builder/contractor market, how would you characterize awareness and acceptance of ENERGY STAR windows? *[Attempt to get High/Medium/Low Responses, probe for suggestions for improvement]*

27. What do you think are the major barriers to the purchase and installation of Energy Star windows by builders and contractors? *[Probe for suggestions for improvement]*

28. How about for consumers? *[Probe for suggestions for improvement]*

29. Has there been confusion over the new skylight requirements? *[Probe for suggestions for improvement]*

30. Do you have any additional suggestions for future market transformation efforts of ENERGY STAR windows?

Thank you for your time!