PREPARED BY GDS ASSOCIATES, INC.

2023-2024 Illinois Baseline Study

Ameren Illinois, Commonwealth Edison, and Nicor Gas

Nonresidential Baseline Study Results

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TABLE OF CONTENTS

1 Introduction

ComEd, Ameren Illinois (Ameren), and Nicor Gas (the Utilities) contracted with GDS Associates (GDS) and GDS's team of subcontractors to develop a baseline study for the nonresidential (C&I) sector. The nonresidential baseline study, a companion residential baseline study, and an energy efficiency potential study combine to provide comprehensive perspectives on the energy use and energy efficiency opportunities within the Utilities' service territories. The nonresidential baseline study provided inputs into the energy efficiency potential study and also provides data and insight for other stakeholders and users of the data.

The nonresidential baseline study was completed with three major elements of primary data collection. These include:

- A large-scale online survey of the Utilities' nonresidential customers to understand the presence of energy consuming equipment. The online survey was also used to recruit for onsite data collection and an additional willingness to participate survey.
- Onsite data collection was conducted by trained technicians to gather technical information difficult to acquire via the online survey. Additionally, site visits were used to verify and inform possible adjustments to the online survey results.
- The willingness to participate survey enabled respondents to describe how they may choose or not choose energy efficiency equipment under various simple payback levels. Additionally, these results were used to inform adoption curves used in the potential study.

Recruitment into the nonresidential baseline study was driven by utility account records with email addresses. These records served as the starting point to understand and confirm respondent energy service providers, building type, and other firmographic information, with utility service provider and building type being points of disaggregation in the results. This report is organized to present the study and results in the following major sections:

Section 2: Methodology Summary

Section 3: Online and Onsite Combined Utility Results

Section 4: Willingness to Participate Results

Appendix: Willingness to Participate Detailed Responses

Note that detailed tables for baseline results are not provided in this written report due to the extensive and complex nature of the responses across building types and utilities. These details are available in an MS-Excel workbook entitled "2023-2024 Illinois Nonresidential Baseline Study."

2 Methods

To collect baseline C&I facility and equipment information, the team used a multi-pronged approach. The team first contacted non-residential customers of Ameren Illinois, ComEd, and Nicor Gas through an online survey. The survey collected high-level penetration information on energy-using equipment and facility characteristics. It also served as a recruitment tool for subsequent on-site data collection, where more detailed equipment information was collected, and a second survey focused on customers' willingness to participate in energy efficiency programs.

2.1 SAMPLE DEVELOPMENT

The study's sampling unit was the business premise, which is defined as a unique business at a unique location. Using data provided by the three sponsor utilities, the team consolidated individual customer accounts into unique business premises. We further cleaned the data by removing premises that were out of the scope of the study (e.g., cell phone towers or street lighting) or had missing usage data.

Following the identification of sites for the population, each site was assigned to sample stratum. Two stratification variables were established for this study:

- **Size - Annual Energy Use**. "Small" denotes sites using less than 100 MWh/year AND less than 60,000 Therms/year while "large" denotes sites using 100 MWh/year or more OR 60,000 Therms/year or more.
- **Segment** – Using 4-digit NAICS codes, the team classified the premises into 11 segments, including nine commercial segments, agriculture, and industrial. Large shares of the premises has missing segments in the utility data and the survey was used to assign respondents to a study segment if needed (or to confirm the utility's segmentation).

The team used a stratified random sample approach to ensure coverage of each important group. Stratification improves the precision of the results by breaking the overall population into more homogenous groups to target specific areas of interest. It also served as an important guide for recruiting to limit reliance on the weighting scheme during analysis. Stratifying premises by their energy usage allowed the team to collect information on energy-using equipment typically only found in large facilities, and to assure that these types of facilities were adequately represented in overall estimates.

Table 1, Table 2, and Table 3 show the populations of C&I premises for ComEd, Ameren Illinois, and Nicor Gas, respectively.

TABLE 1. COMED C&I POPULATION

Segment	Small	Large	Total
Office	113,900	12,440	126,340
Hospitals/ Health Services	20,819	2,420	23,239
Retail	26,678	4,651	31,329
Food Service	12,778	5,577	18,355
Warehouse	10,447	2,797	13,244
Grocery/Convenience	5,220	3,100	8,320
Education	4,691	3,026	7,717
Lodging/Hospitality	1,111	707	1,818
Other Commercial	41,680	5,483	47,163

Segment	Small	Large	Total
Multifamily	3,405	231	3,636
Agriculture	27,199	6,202	33,401
Industrial	9,493	1,304	10,797
Unknown	27,185	1,873	29,058
Total	304,606	49,811	354,417

TABLE 2. AMEREN ILLINOIS C&I POPULATION

Segment	Small	Large	Total
Office	47,360	2,675	50,035
Hospitals/ Health Services	5,211	1,008	6,219
Retail	11,192	1,193	12,385
Food Service	1,351	113	1,464
Warehouse	15,576	998	16,574
Grocery/Convenience	1,747	1,092	2,839
Education	5,538	1,336	6,874
Lodging/Hospitality	1,119	395	1,514
Other Commercial	24,782	2,272	27,054
Multifamily	3,220	240	3,460
Agriculture	14,753	1,885	16,638
Industrial	6,227	134	6,361
Unknown	44,138	2,089	46,227
Total	182,214	15,430	197,644

TABLE 3. NICOR GAS C&I POPULATION

Segment	Small	Large	Total
Office	49,509	326	49,835
Hospitals/ Health Services	13,192	284	13,476
Retail	15,807	109	15,916
Food Service	13,729	60	13,789
Warehouse	8,797	255	9,052
Grocery/Convenience	3,417	187	3,604
Education	8,869	562	9,431
Lodging/Hospitality	870	33	902
Other Commercial	20,478	297	20,775
Multifamily	28,889	145	29,034
Agriculture	889	70	958
Industrial	23,645	1,275	24,920
Total	188,090	3,602	191,692

After establishing the C&I population of the three sponsor utilities, the team consolidated the data into a single sample frame consisting of unique premises with an email address. The team then set targets for each utility/segment/size stratum based on a combination of the number of premises in the sample frame, an expected response rate, and precision goals.

Using the stratified random sampling approach, the team attempted to contact 116,685 of the 467,776 business premises in the sample frame to complete the survey.[1] The team sent invitation emails from March to June 2024. As responses were received, the data collection team tracked response rates by targeted groups and adjusted the proportions by group for each survey wave. This was done to reach all the stratum targets. In addition to the email invitations, the study team worked with utility account managers to reach large managed accounts to increase the number of completes in the large usage strata. Overall, the survey effort resulted in a total of 1,702 complete C&I surveys or a 1.5% response rate as well as 657 partial surveys. After reviewing all responses, the study team was able to use 2,157 surveys in the analysis, supplemented by 399 site visits, as shown in the table below.

TABLE 4. C&I BASELINE STUDY COMPLETED SURVEYS AND SITE VISITS

Segment	Size	Electric Utility	Sample Frame	Completed Surveys	Completed Site Visits
Office	Large	Ameren Illinois	2,675	3	2
		ComEd	12,440	46	4
	Small	Ameren Illinois	47,360	127	20
		ComEd	113,900	186	27
Hospitals/ Health Services	Large	Ameren Illinois	1,008	1	1
		ComEd	2,420	19	5
	Small	Ameren Illinois	5,211	25	2
		ComEd	20,819	167	33
Retail	Large	Ameren Illinois	1,193	2	1
		ComEd	4,651	17	2
	Small	Ameren Illinois	11,192	113	23
		ComEd	26,678	171	35
Food Service	Large	Ameren Illinois	113	8	4
		ComEd	5,577	31	11
	Small	Ameren Illinois	1,351	21	5
		ComEd	12,778	86	23
Warehouse	Large	Ameren Illinois	998	1	0
		ComEd	2,797	21	1
	Small	Ameren Illinois	15,576	86	11
		ComEd	10,447	89	13
Grocery/Convenience	Large	Ameren Illinois	1,092	7	3
		ComEd	3,100	8	3
	Small	Ameren Illinois	1,747	10	2
		ComEd	5,220	20	5
Education	Large	Ameren Illinois	1,336	4	2
		ComEd	3,026	38	12
	Small	Ameren Illinois	5,538	26	5
		ComEd	4,691	52	16
Lodging/Hospitality	Large	Ameren Illinois	395	4	0

[1] The team only contacted 24% of the total sample frame because some strata, such as small office, accounted for large shares of the total and did not need to be contacted after the target number of surveys were achieved.

Segment	Size	Electric Utility	Sample Frame	Completed Surveys	Completed Site Visits
		ComEd	707	11	5
		Ameren Illinois	1,119	18	6
	Small	ComEd	1,111	5	0
Other Commercial		Ameren Illinois	2,272	8	1
	Large	ComEd	5,483	43	6
		Ameren Illinois	24,782	88	10
	Small	ComEd	41,680	73	11
Multifamily		Ameren Illinois	134	1	1
	Large	ComEd	1,304	12	2
		Ameren Illinois	6,227	65	10
	Small	ComEd	9,493	109	18
Agriculture		Ameren Illinois	240	2	1
	Large	ComEd	231	3	1
		Ameren Illinois	3,220	50	8
	Small	ComEd	3,405	47	10
Industrial		Ameren Illinois	1,885	4	0
	Large	ComEd	6,202	59	9
		Ameren Illinois	14,753	31	8
	Small	ComEd	27,199	139	21
Subtotal		*Ameren Illinois*	*13,341*	*45*	*16*
	Large	*ComEd*	*47,938*	*308*	*61*
		Ameren Illinois	*138,076*	*660*	*110*
	Small	*ComEd*	*277,421*	*1,144*	*212*
Total			**476,776**	**2,157**	**399**

2.2 DATA COLLECTION

2.2.1 Survey Instrument

The C&I baseline survey collected a variety of information about C&I facilities and their energy-using equipment. The data points collected in the C&I baseline survey are summarized in the list below.

- Occupancy Verification
- Business segment
- On-site study recruitment
- Building characteristics (age, square footage, seasonality)
- Cooling equipment
- Heating equipment and energy source
- Ventilation
- HVAC controls
- Water heating equipment and energy source
- Refrigeration
- Lighting
- Commercial kitchen equipment
- Compressed air
- Motors and pumps
- Energy management

- On-site generation
- EVs and EV chargers
- Agriculture equipment
- Other equipment
- Maintenance and behavior
- Firmographics
- Consent to receive Willingness to Pay survey invitation

The data points collected in the C&I Willingness To Pay survey are summarized in the list below.

- Perspectives on investment levels to define "major" or "minor" investments in energy efficiency
- For space heating and cooling, domestic water heating, and refrigeration:
    - Barriers and motivators to invest in energy efficient equipment
    - Simple payback scenarios to understand willingness to install energy efficient equipment with utility incentives
- For advanced lighting controls:
    - The presence of various lighting control equipment in their facility,
    - Experience with and knowledge of advanced lighting control technologies
    - Current status of their facility vis a vis LED lighting retrofits
    - Interest in future considerations for installing advanced lighting controls

2.2.2 On-Site Data Collection Tool

The study team developed a customized on-site data collection tool to collect the facility and equipment information required for this study. The team programmed the survey into QuickBase, a cloud-based application development platform. The application ensured consistent data collection across technicians and sites, as well as skip logic so only the appropriate fields are collected depending on the previous entered information about the site and equipment. It also served as both a scheduling tool for site visits and a comprehensive data repository to display and analyze data. The tool collected detailed facility and equipment information, including:

- General site information
- Building information
- Building envelope characteristics
- HVAC controls
- Cooling equipment
- Chillers
- Energy management systems
- Heating equipment
- HVAC ventilation
- Steam traps
- Lighting
- Commercial kitchen equipment
- Commercial laundry
- Combined heat and power
- Renewables
- Other equipment
- Compressed air equipment

- Motors
- Retrocommissioning
- Water heating
- Agriculture equipment and irrigation

2.2.3 Data Collection

2.2.3.1 Online Baseline Survey

As discussed above, the study team sent email invitations to a stratified random sample of C&I customers of Ameren Illinois, ComEd, and Nicor Gas. The team offered a $25 incentive to complete the survey.

2.2.3.2 Willingness to Participate Survey

The study team included in the online baseline survey an invitation to participate in the willingness to participate survey. The team offered a sweepstakes incentive for a chance to win one of 10 $200 gift cards.

2.2.3.3 On-Site Data Collection

The on-line survey was used to recruit a subset of C&I facilities for the on-site data collection. Within two weeks of the survey completion, the study team contacted respondents who indicated an interest to schedule an on-site assessment at their convenience. To maximize study participation, on-site assessment participants were offered a $150 stipend (in addition to the $25 online survey stipend). Once an onsite survey was scheduled, trained field engineers were deployed to the facility to conduct the site visit.

3 Key Baseline Study Results

3.1 BUILDING CHARACTERISTICS

Survey participants were asked about the characteristics of their premise and the facility in which they were located. Table 5 shows the mean area of the business premise by segment.

TABLE 5. MEAN PREMISE SQUARE FOOTAGE BY SEGMENT

Segment	Total
Office	15,064
Hospitals/ Health Services	6,666
Retail	8,097
Food Service	3,302
Warehouse	49,993
Grocery/Convenience	5,924
Education	31,948
Lodging/Hospitality	38,151
Other Commercial	8,361
Multifamily	29,008
Agriculture	23,631
Industrial	31,346

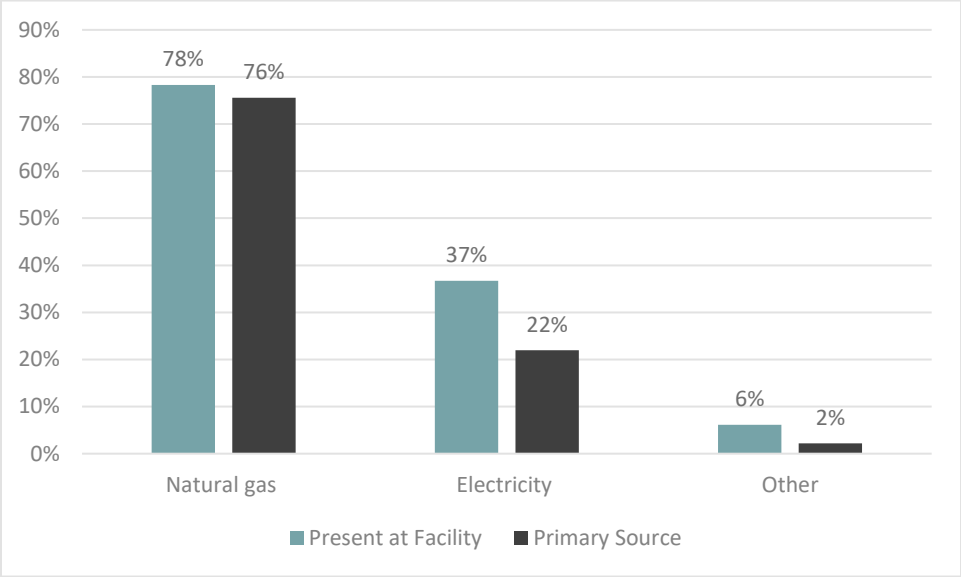
Other key building characteristics findings include:

- Overall, 51% of businesses owned their space at the facility in which they were located. However, this varied by geography: 72% of Ameren Illinois electric customers owned their space compared to only 43% of ComEd customers and 45% of Nicor Gas customers.
- Nearly all facilities (98%) operate year-round.
- 69% of businesses occupy all of the facility in which they are located.
- Approximately half (54%) of facilities are stand-along buildings, while 30% are buildings that share walls with other buildings and 8% consist of multiple buildings.
- Approximately one in five (17%) of facilities participated in an energy efficiency program in the past five years. This share was very similar across the different utilities.

3.2 SPACE HEATING

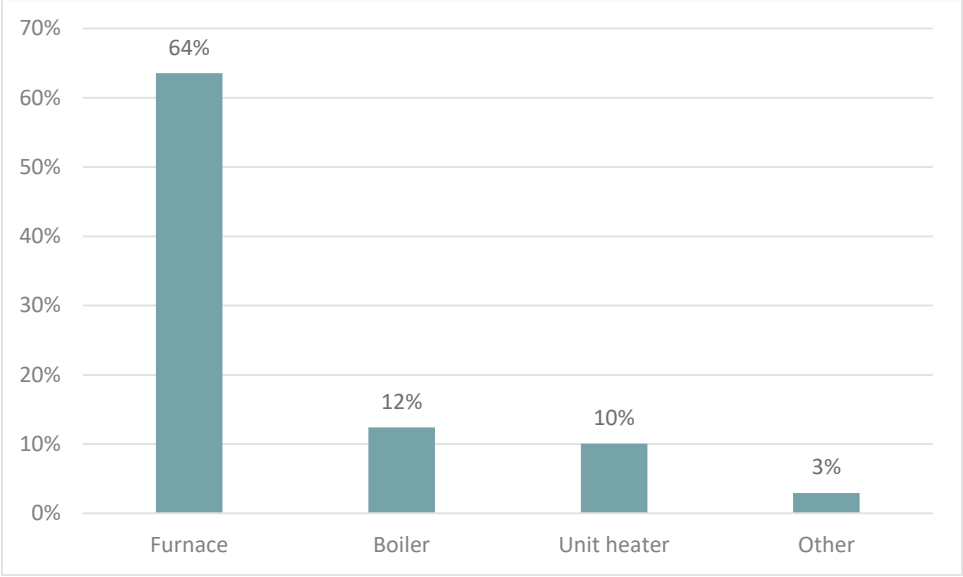
The vast majority (87%) of organizations have dedicated heating systems that serve only their space and is not shared with other spaces. Natural gas was the primary energy source for space heating equipment among Illinois C&I facilities. As shown in Figure 1, more than three quarters (78%) of facilities had natural gas heating equipment and natural gas was the primary energy source at 76%. Thirty-seven percent of facilities had electric heating equipment, but this was the primary energy source for only 22% of facilities.

FIGURE 1. ENERGY SOURCE FOR SPACE HEATING (N=2050)



Furnaces made up the majority of natural gas space heating equipment and 64% of facilities have a natural gas furnace, compared to 12% with a natural gas boiler and 10% with a natural gas unit heater.

FIGURE 2. PENETRATION OF NATURAL GAS SPACE HEATING EQUIPMENT (N=1321)



Twenty percent of Illinois facilities have electric resistance space heating equipment and 13% have electric unit heaters. According to the survey, six percent of facilities have heat pumps. This is similar to the penetration of heat pumps found in the site visits (9%).

FIGURE 3. PENETRATION OF ELECTRIC SPACE HEATING EQUIPMENT (N=487)

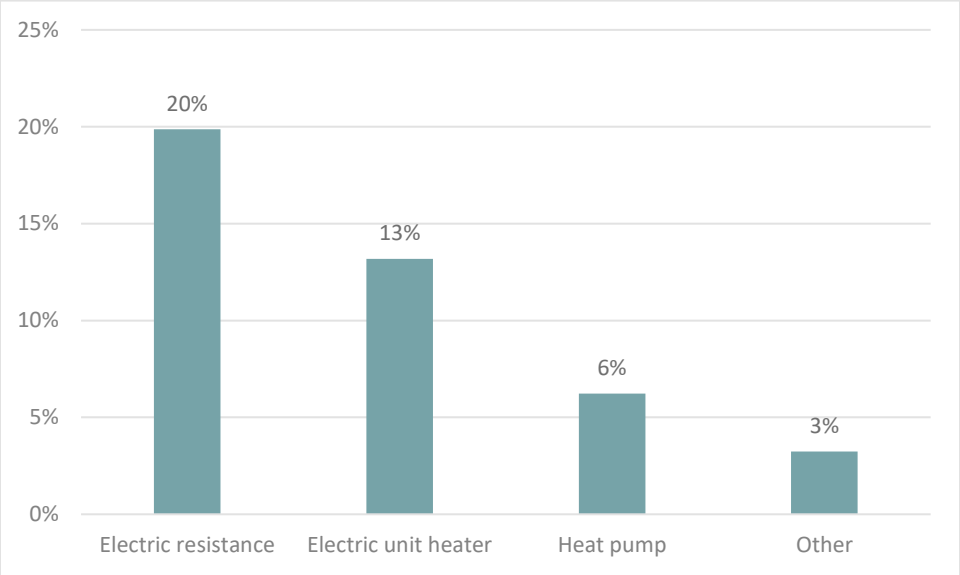


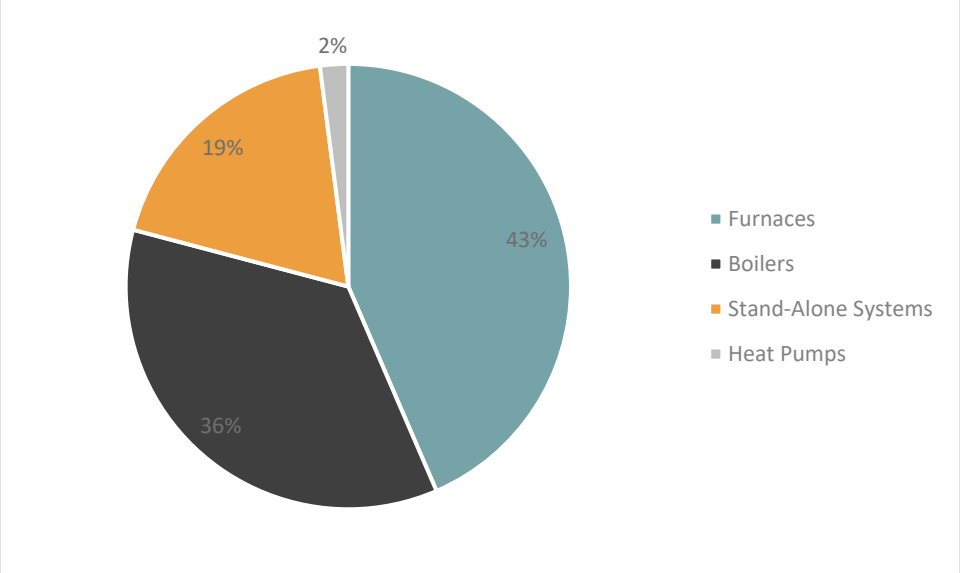
Table 6 shows equipment characteristics for major space heating equipment types, including their average age, capacity, and efficiency.

TABLE 6. HEATING EQUIPMENT CHARACTERISTICS

Equipment Type	Average Age	Average Capacity (Btu/hr)	Average Efficiency
Furnace	12.8	133,818	83% AFUE
Boiler	20.7	781,166	86% AFUE
Heat Pump	9.6	35,634	8.7 HSPF

Furnaces accounted for the largest share (43%) of total heating capacity, slightly more than boilers (36%). Although boilers are less common than furnaces, they tend to have larger heating capacities. Heat pumps currently only account for a small share of total heating capacity in Illinois, but that will likely increase as this technology continues to be adopted. Stand-alone systems make up the remaining 19%. Stand-alone systems include a variety of heating equipment types that are not part of a larger HVAC system, such as space heaters and unit heaters.

FIGURE 4. SHARE OF TOTAL HEATING CAPACITY BY EQUIPMENT TYPE

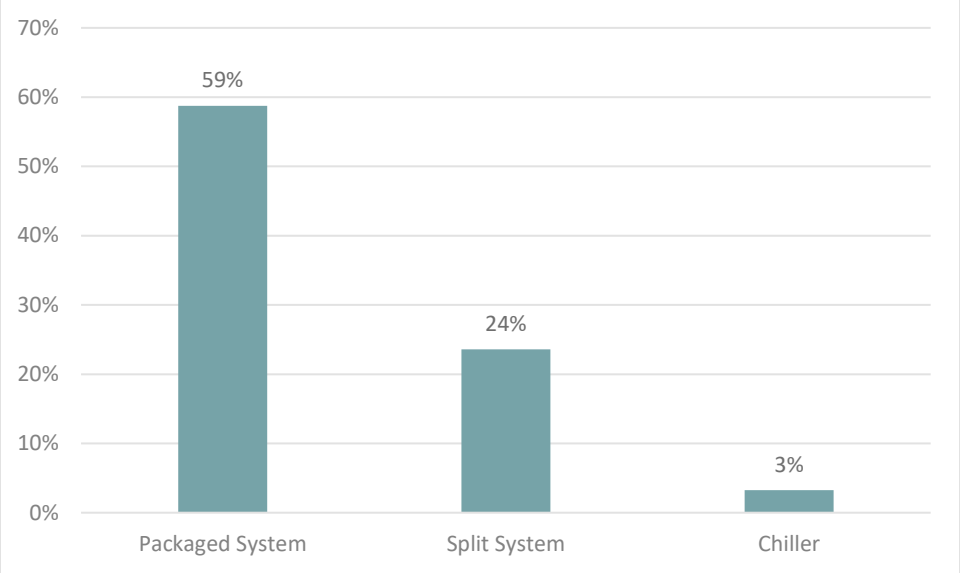


3.3 SPACE COOLING

Eighty-one percent of Illinois C&I facilities have cooling equipment. Of those, 85% have dedicated cooling that serves only their space and is not shared with other spaces. The large majority of facilities (81%) have central air conditioning equipment, while 15% have room, window, or through-wall air conditioning.

Figure 5 shows the penetration of central cooling equipment. Most C&I facilities (59%) have packaged systems, while one-quarter have split systems, and only 3% have chillers.

FIGURE 5. PENETRATION OF CENTRAL COOLING EQUIPMENT (N=1222)



Window/wall AC units are the most common room or window AC equipment, with 10% of facilities reporting having this equipment. Two percent of facilities have ductless mini-split systems and another two percent have portable ACs.

Table 7 shows equipment characteristics for major cooling equipment types, including their average age, capacity, and efficiency. Note that the study team did not have enough observations of split system efficiencies to report.

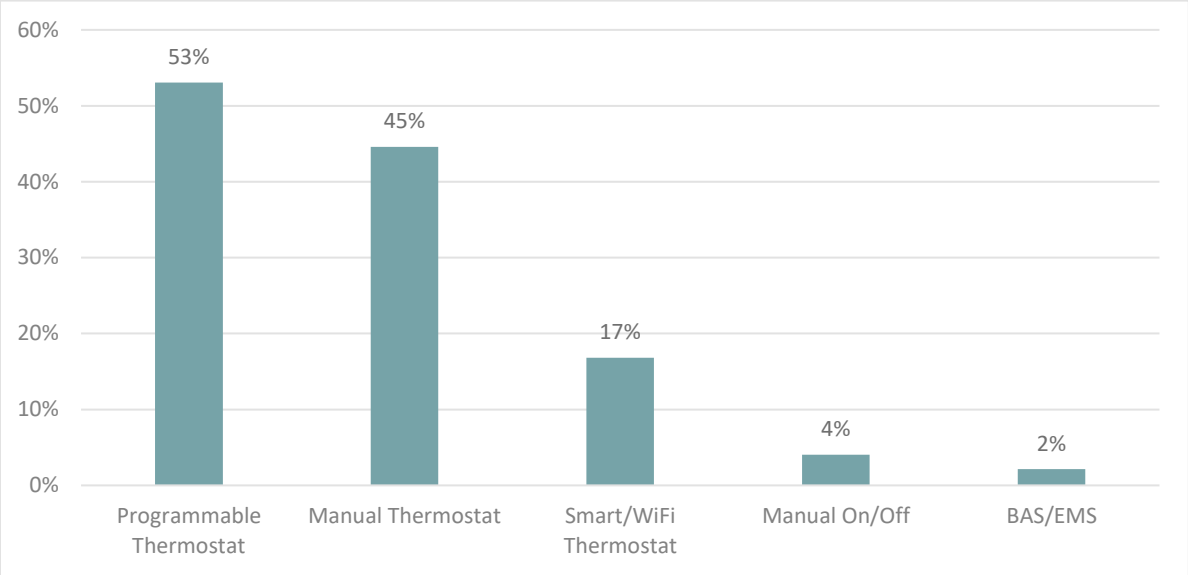
TABLE 7. COOLING EQUIPMENT CHARACTERISTICS

Equipment Type	Average Age	Average Capacity	Average Efficiency
Split System	12.1	3.9 tons	--
Packaged System	10.5	7.8 tons	11.3 EER
Window/Wall AC	15.5	18,863 Btu/hr	11.2 EER

3.4 HVAC CONTROLS

Many C&I facilities have more than one HVAC control type. As shown in Figure 6, slightly more than half of facilities have programmable thermostats and another 45% have manual thermostats. Smaller shares of sites have other HVAC control types.

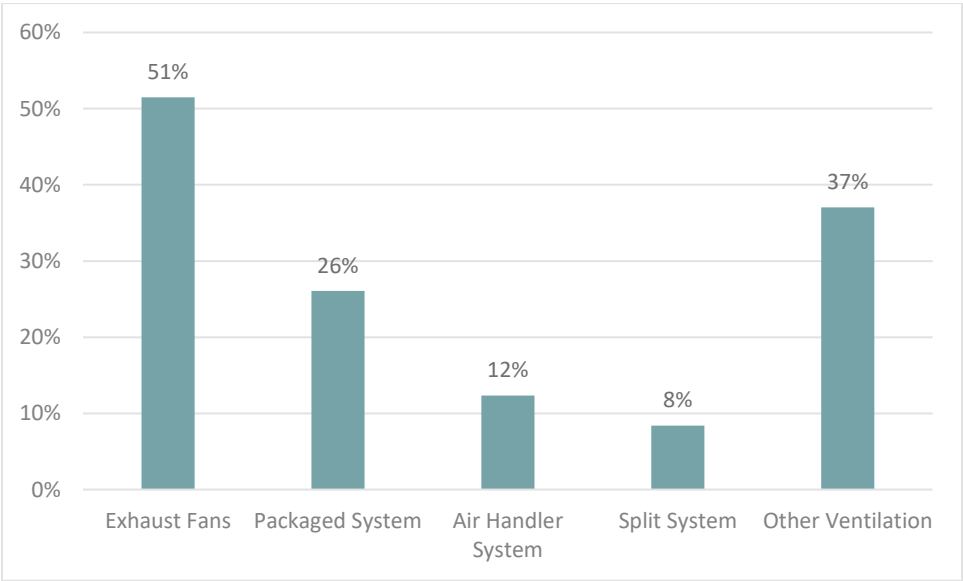
FIGURE 6. PENETRATION OF HVAC CONTROLS (N=355)



3.5 VENTILATION

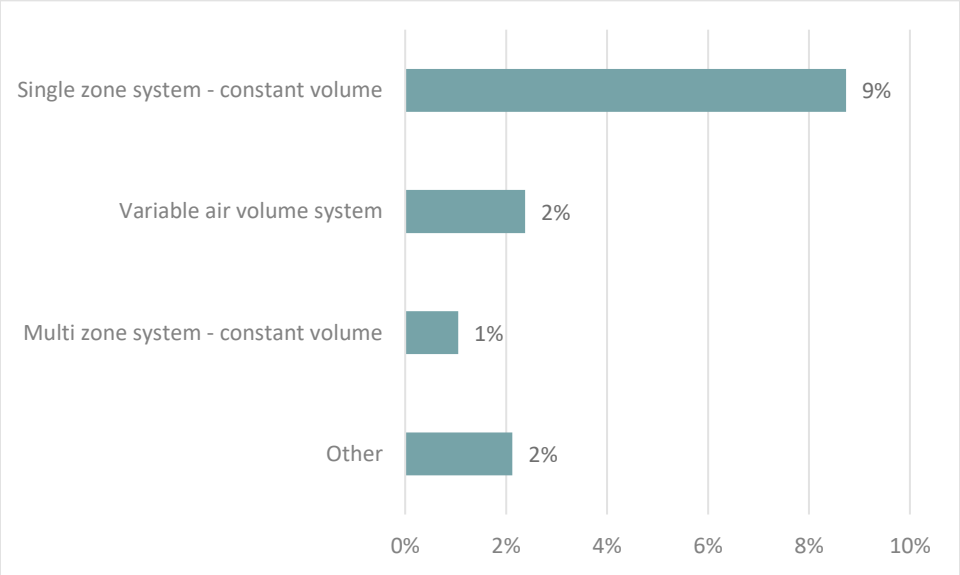
Illinois C&I facilities use a variety of equipment for ventilation. Roughly half (51%) have exhaust fans and 12% have air handler systems. Other facilities use their packaged systems, split systems, or other equipment to ventilate their spaces.

FIGURE 7. PENETRATION OF VENTILATION EQUIPMENT



Among sites with air handlers, constant volume single zone systems were the most common, as shown in Figure 8.

FIGURE 8. PENETRATION OF AIR HANDLER AIR DISTRIBUTION SYSTEMS

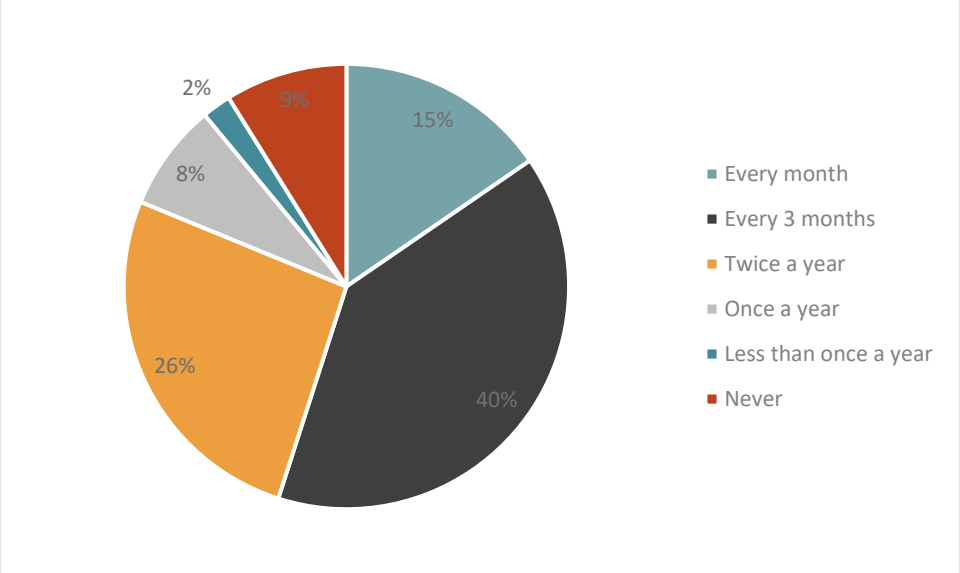


Other notable ventilation findings include:

- Twenty-one percent of Illinois facilities have demand controlled ventilation. This was most common in the food service, lodging/hospitality, and grocery/convenience segments.
- Twenty percent of facilities have ventilation hoods. Of those, 41% have variable fan speed or demand controlled ventilation. Hoods are most common in the food service, lodging/hospitality, education, and grocery/convenience segments.
- Only 13% of facilities have ventilation systems with a heat recovery ventilator (HRV).
- Slightly more than one quarter (27%) of facilities have a Dedicated Outdoor Air System (DOAS)

As shown in Figure 9, more than half of facilities replace the filters in their air circulation or ventilation equipment at least once every three months. Notably, 86% of lodging/hospitality facilities change their filters at least once every three months. Approximately two-thirds of grocery/convenience, food service, and hospitals/health services facilities also replace their filters on this schedule.

FIGURE 9. FILTER REPLACEMENT SCHEDULE FOR VENTILATION EQUIPMENT (N=257)

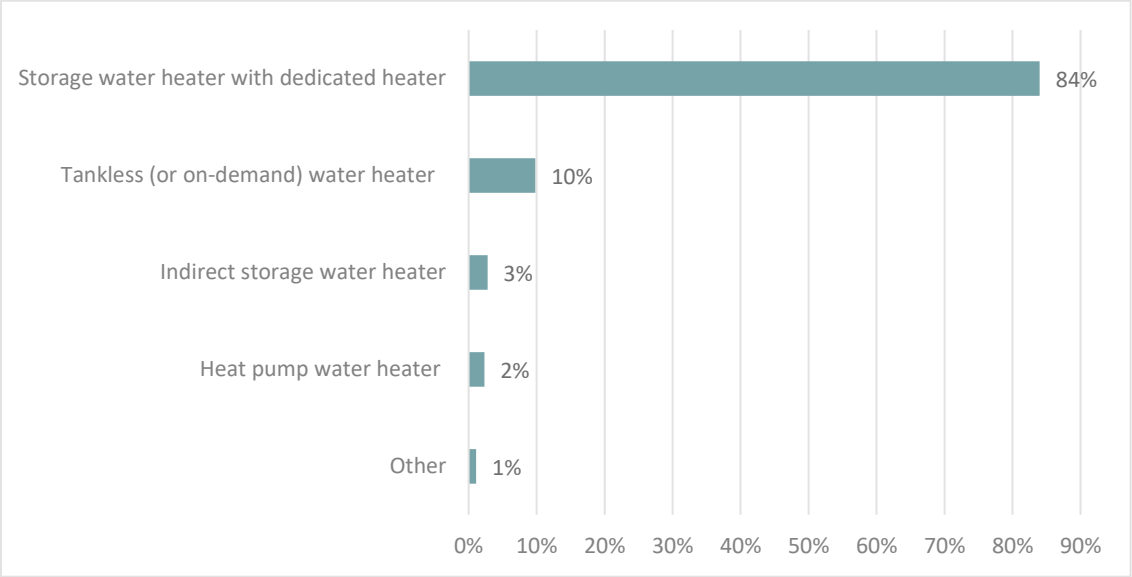


3.6 WATER HEATING AND LAUNDRY

3.6.1 Domestic Water Heaters

Eighty-one percent of Illinois C&I facilities have equipment for water heating. Of those, 80% have dedicated water heating equipment not shared with other spaces. Natural gas was the most common energy source: 60% of facilities have natural gas water heating equipment while 38% have electric water heaters and 1% have propane units. As shown in Figure 10, the vast majority (84%) of facilities have storage water heaters with dedicated (non-heat pump) heaters.

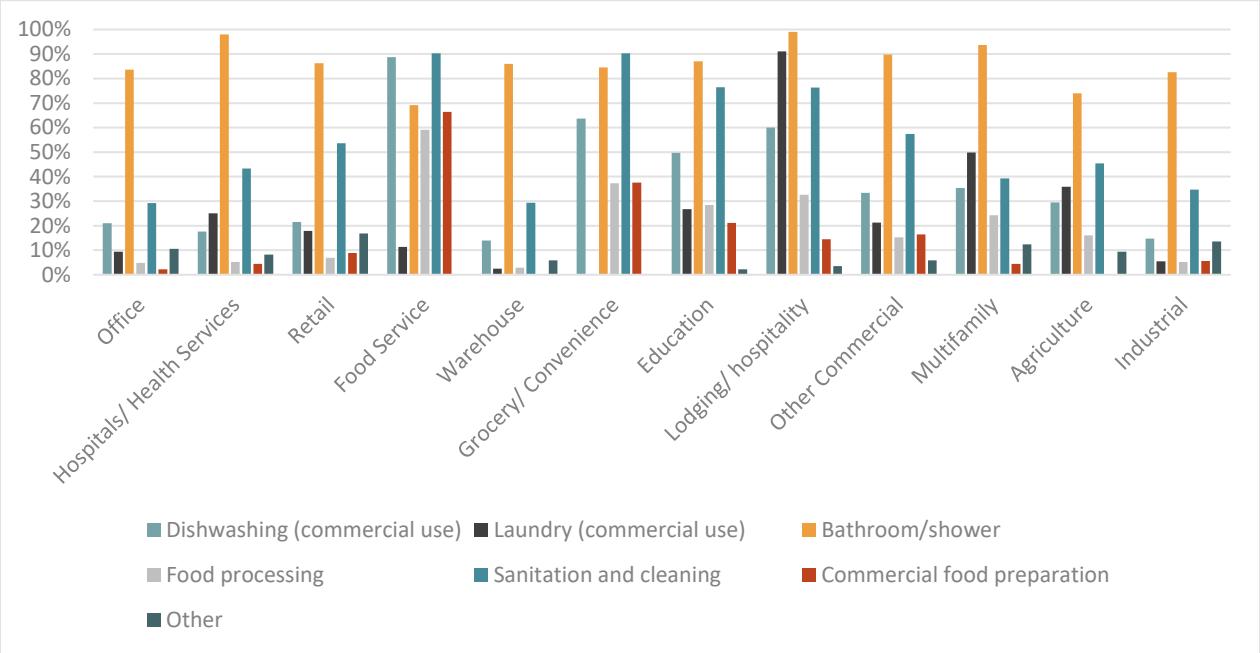
FIGURE 10. PENETRATION OF WATER HEATING EQUIPMENT (N=1187)



Natural gas storage tank water heaters have an average storage capacity of 53.2 gallons while electric versions have a capacity of 27.8 gallons. Tankless water heaters have capacities of 197,689 Btu for natural gas units and 8.9 kW for electric units.

Figure 11 shows the various applications for which C&I facilities use hot water. Most facilities (81%) use hot water for bathrooms and showers, followed by sanitation and cleaning (42%).

FIGURE 11. HOT WATER USE BY SEGMENT (N=2616)



3.6.2 Laundry Equipment

Fourteen percent of Illinois C&I facilities use hot water for commercial laundry. Of the sites with laundry equipment, 80% have a washer, 81% have a dryer, and 22% have a washer/dryer combination unit. Electricity is the most common energy source for dryers, with 58% of facilities using electricity and 40% using natural gas.

Key laundry equipment characteristics include:

- 32% of washers and 22% of dryers are ENERGY STAR rated.
- Twenty-two percent of washers use Xeros beads. However, these were all in the hospital/health services segment, where 92% of washers had Xeros beads.
- The average age of washers and dryers is 7.6 and 7.4 years, respectively.
- Less than 1% of washers are ozone washing machines. These were only found in the lodging/hospitality segment.

3.7 LIGHTING

Due to federal standards, building energy codes, and technology advances, both linear and non-linear LEDs have become broadly adopted in Illinois. Despite this growth in LED lighting, linear fluorescent and other types of lighting are still widely installed in facilities.

3.7.1 Linear Lighting

Figure 12 shows the penetration of linear commercial lighting in C&I facilities. 43 percent of facilities have at least one T8 linear fluorescent bulb installed and 20% have at least one T12. Linear LED retrofits, tubular linear LEDs, and linear LED luminaires have penetrations of 20%, 12%, and 5%, respectively.

FIGURE 12. PENETRATION OF LINEAR COMMERCIAL LIGHTING (N=294)

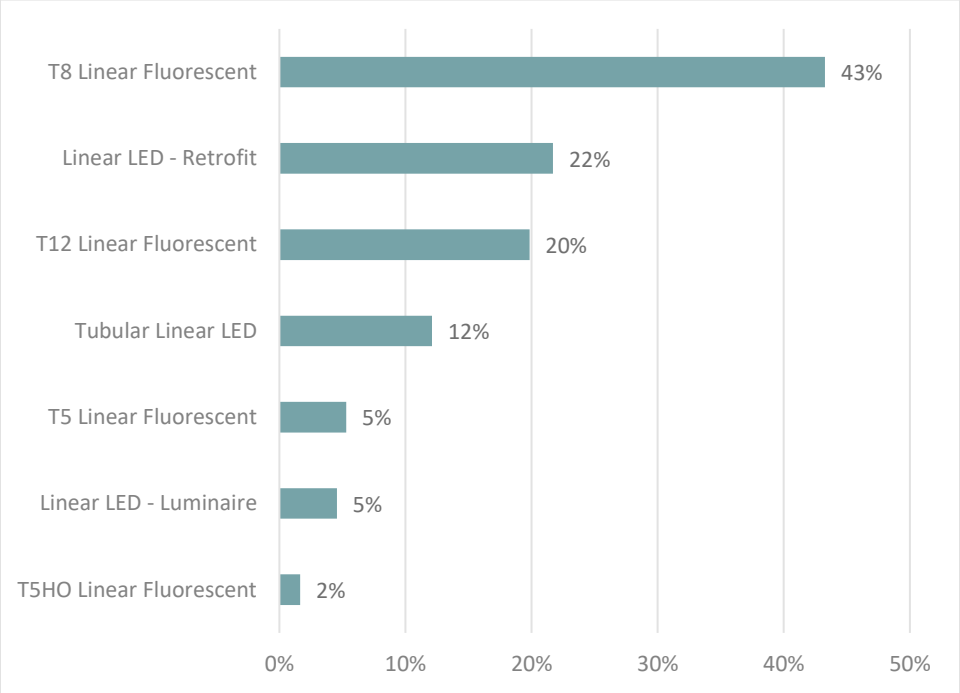
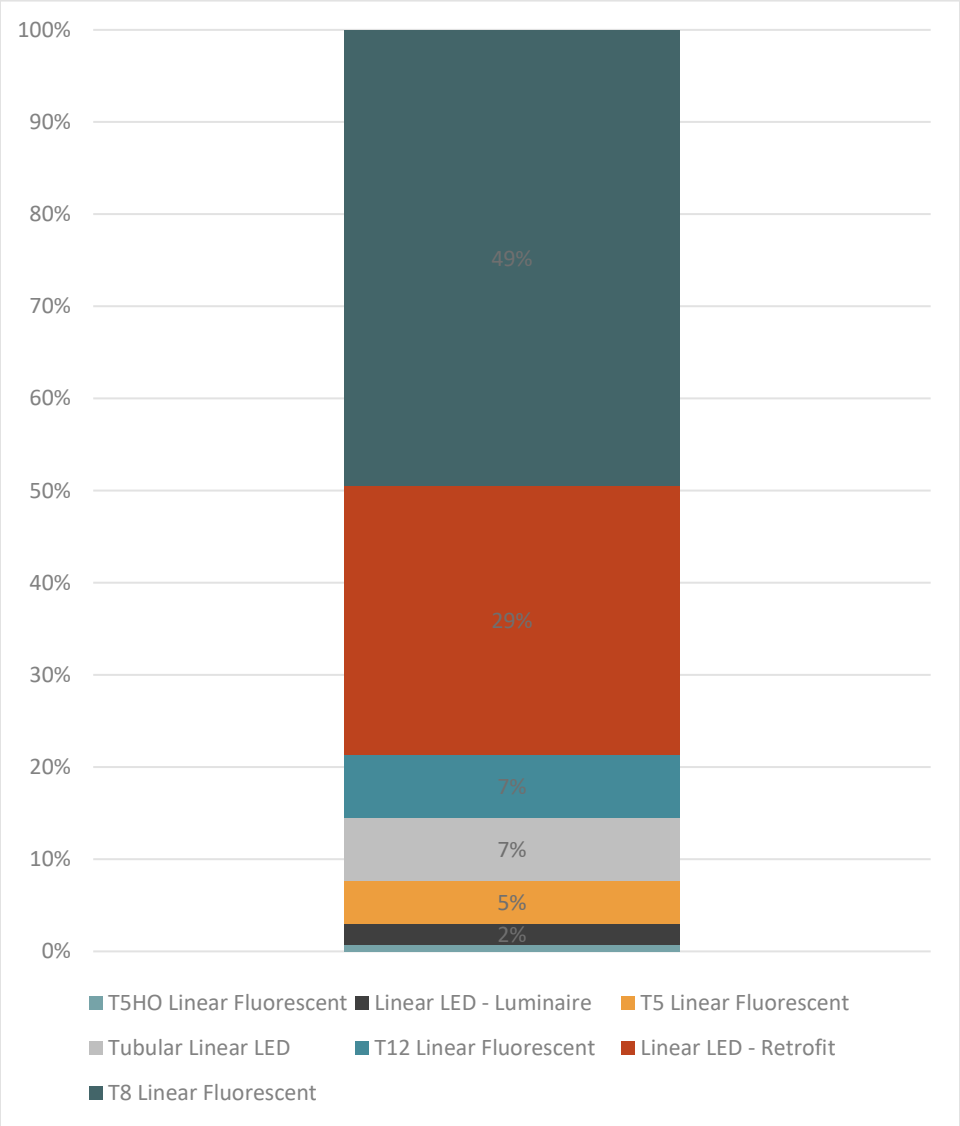


Figure 13 illustrates the socket saturation of linear commercial lighting. C&I facilities in Illinois have 91.4 linear fixtures on average. Among those, nearly half (49%) are T8 linear fluorescent fixtures and 29% are linear LED retrofit fixtures. All types of linear LED fixtures account for 38% of the total, or 35 fixtures per site.

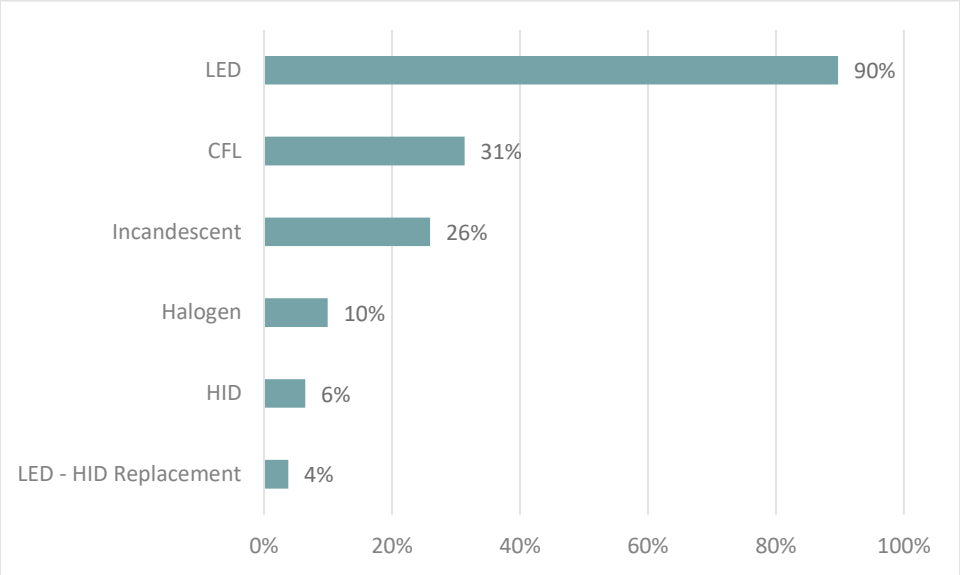
FIGURE 13. SOCKET SATURATION OF LINEAR COMMERCIAL LIGHTING (N=394)



3.7.2 Non-Linear Lighting

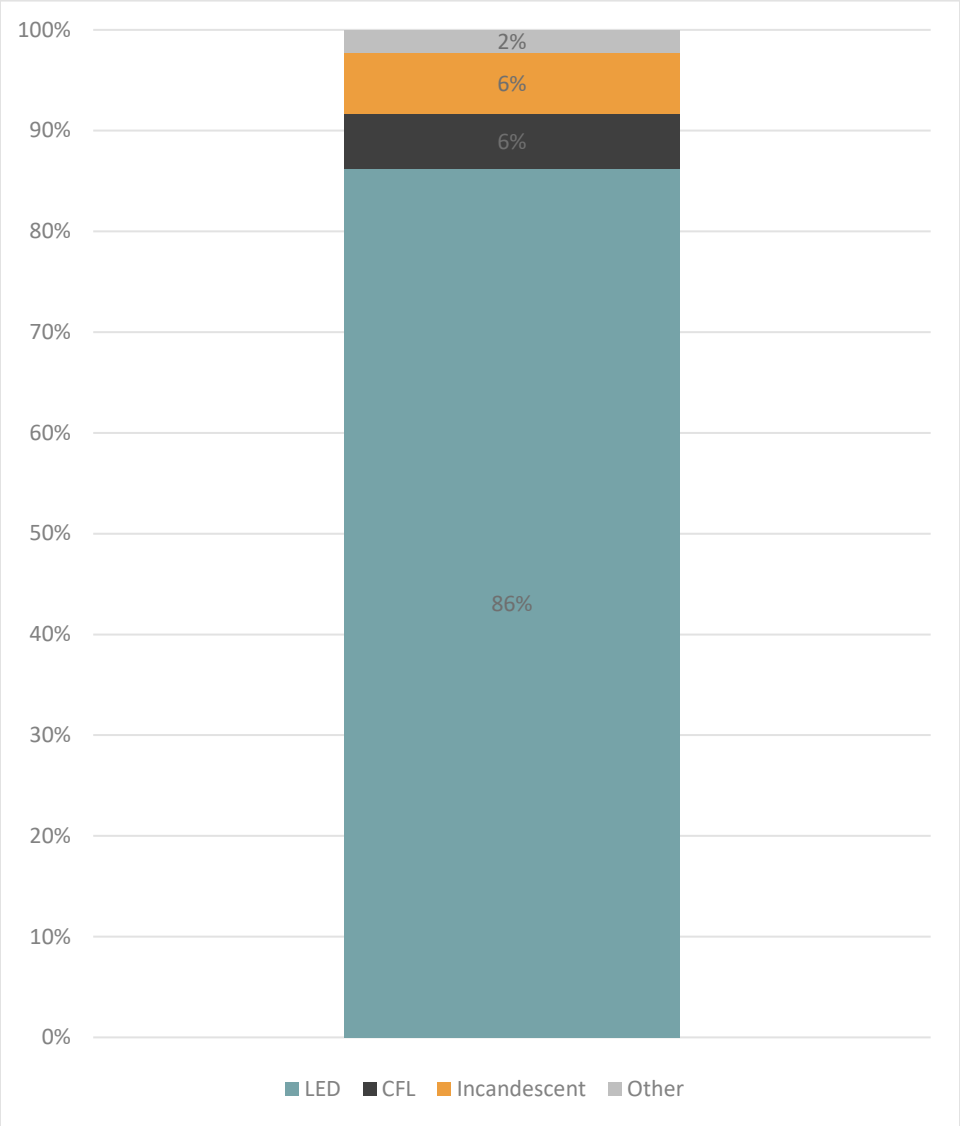
The non-linear lighting market is mostly transformed in the Illinois C&I sector. Ninety percent of facilities have at least one non-linear LED and 4% of facilities have LED – HID replacement fixtures.

FIGURE 14. PENETRATION OF NON-LINEAR COMMERCIAL LIGHTING (N=394)



Although notable shares of facilities have CFLs, incandescent, or halogen bulbs, they represent a very small share of installed bulbs as shown in Figure 15. C&I facilities in Illinois have an average of 99.9 non-linear light fixtures and the vast majority (86%) are LEDs.

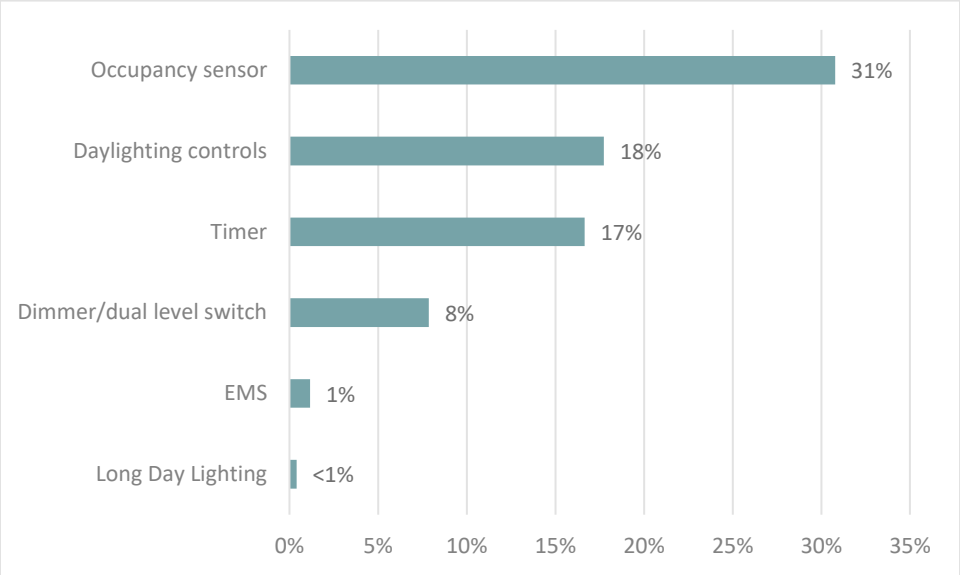
FIGURE 15. SOCKET SATURATION OF NON-LINEAR COMMERCIAL LIGHTING (N=394)



3.7.3 Lighting Controls

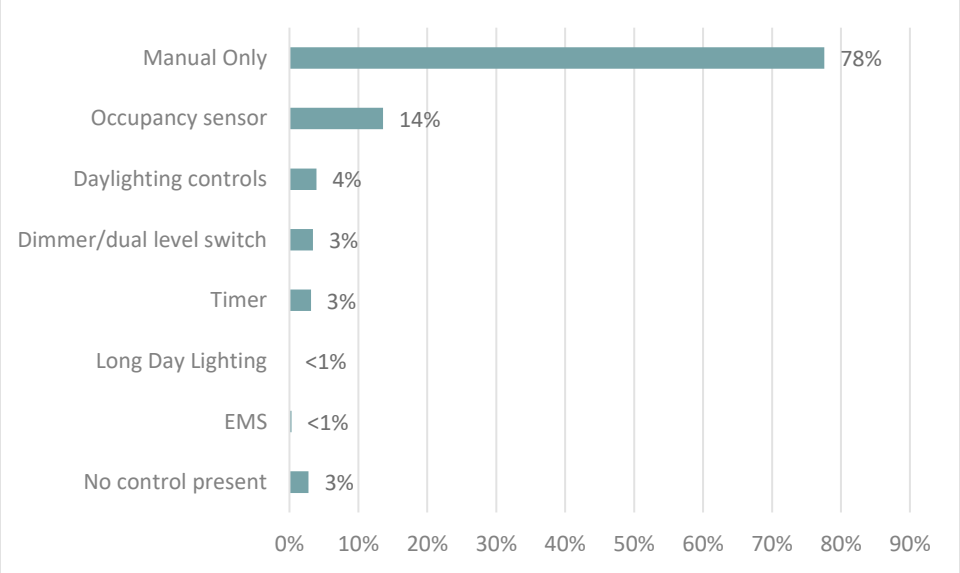
As expected, nearly all (98%) of C&I facilities in Illinois have at least one fixture only controlled by a manual switch. Forty percent have at least one fixture controlled by both a manual and one non-manual control (e.g., occupancy sensor, timer, etc.) and 3% have fixtures with manual and multiple non-manual controls. Twenty one percent of facilities have fixtures that have non-manual control only. Figure 16 shows the penetration of non-manual lighting controls. Nearly one-third of facilities have occupancy sensors and approximately half as many sites have daylighting controls or timers.

FIGURE 16. PENETRATION OF NON-MANUAL LIGHTING CONTROLS



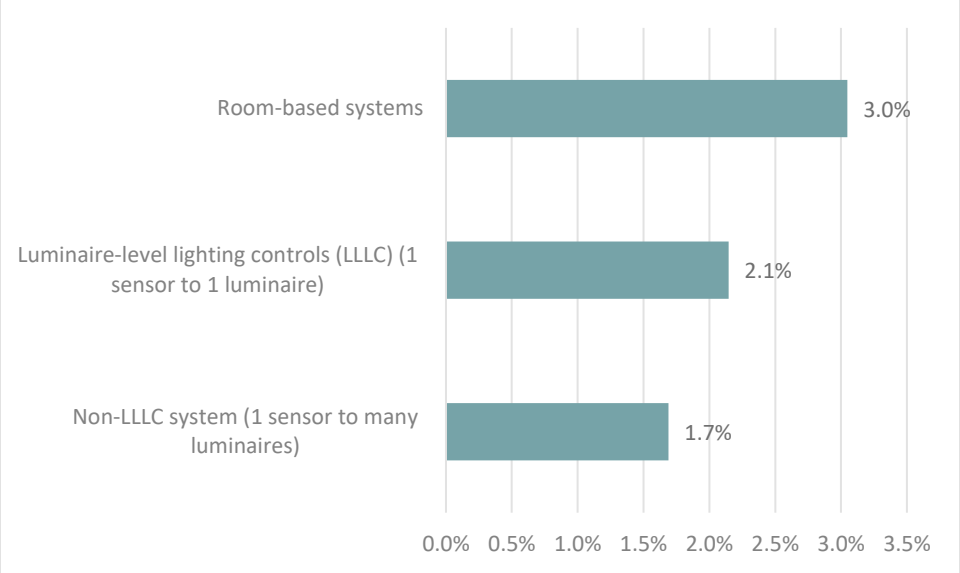
Although significant shares of facilities have non-manual controls, the large majority of light fixtures (78%) have manual controls (Figure 17). Fourteen percent of fixtures are controlled with occupancy sensors.

FIGURE 17. SHARE OF LIGHT FIXTURES CONTROLLED BY CONTROL TYPE



Seven percent of C&I facilities indicated in the survey that they have networked lighting controls. These types of controls can consist of: luminaire-level lighting controls (LLLCs), a system in which every luminaire has its own built-in sensor and controller; non-LLLC systems, in which sensors and controllers are installed remotely from luminaires; and room-based systems, which are pre-packaged sensors and controllers intended for lighting control in small spaces. As shown in Figure 18, the penetration for these controls is still very low.

FIGURE 18. PENETRATION OF NETWORKED LIGHTING CONTROLS BY TYPE (N=933)

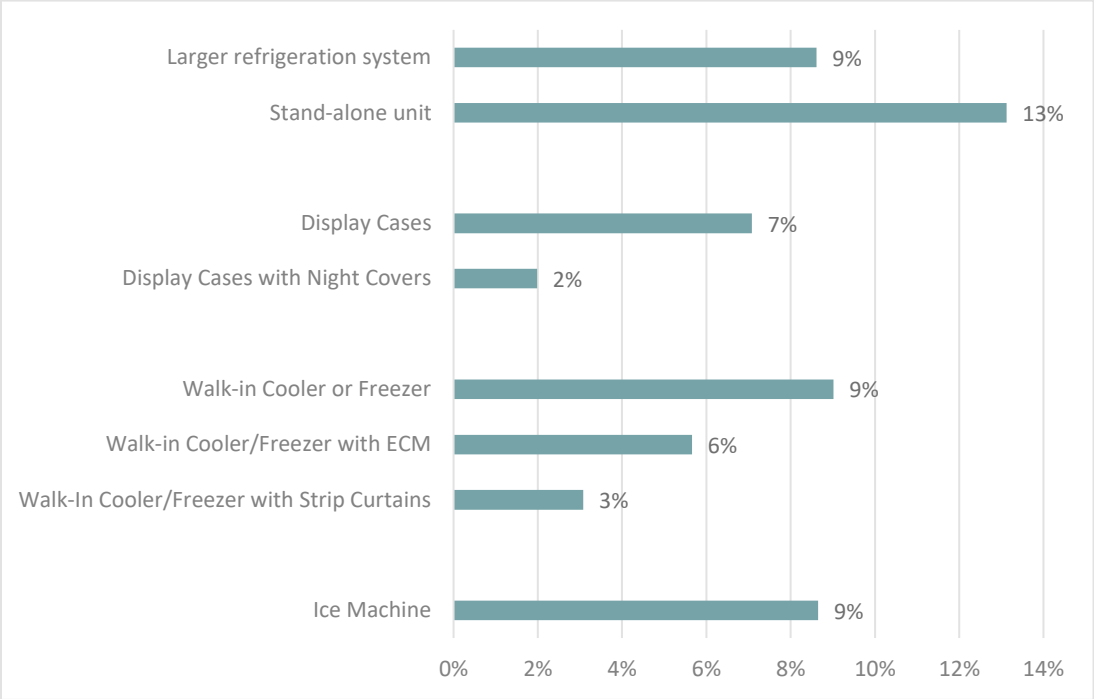


3.8 REFRIGERATION

Sixteen percent of C&I facilities have commercial or industrial refrigeration equipment. Nearly all (92%) of facilities have a residential-style solid door refrigerator or freezer.

Figure 19 shows the penetration of key commercial refrigeration equipment. Nine percent of facilities have a large refrigeration system, which includes large display cases or walk-in coolers where the compressor is separate from the refrigeration equipment, and 14% have stand-alone units, which have self-contained refrigeration not connected to a larger system. As expected, penetration of large commercial refrigeration systems is highest in the grocery/convenience and food service segments.

FIGURE 19. PENETRATION OF COMMERCIAL REFRIGERATION EQUIPMENT (N=1649)



The table below shows the average age of major types of commercial refrigeration equipment. Walk-in coolers and freezers are oldest, on average, with a mean age of 17 years.

TABLE 8. AVERAGE AGE OF COMMERCIAL REFRIGERATION EQUIPMENT

Equipment Type	Average Age
Walk-in Cooler or Freezer	17.2
Refrigerated Cases	12.0
Refrigerated Vending Machines	12.1
Stand-Alone Refrigeration	7.6
Residential-Style Solid Door Refrigerator	11.5

3.9 KITCHEN EQUIPMENT

Ten percent of C&I facilities have commercial kitchen equipment. Of the facilities with this equipment, the most common equipment types are commercial fryers, convection ovens, and dishwashers.

FIGURE 20. PENETRATION OF COMMERCIAL COOKING EQUIPMENT (N=680)

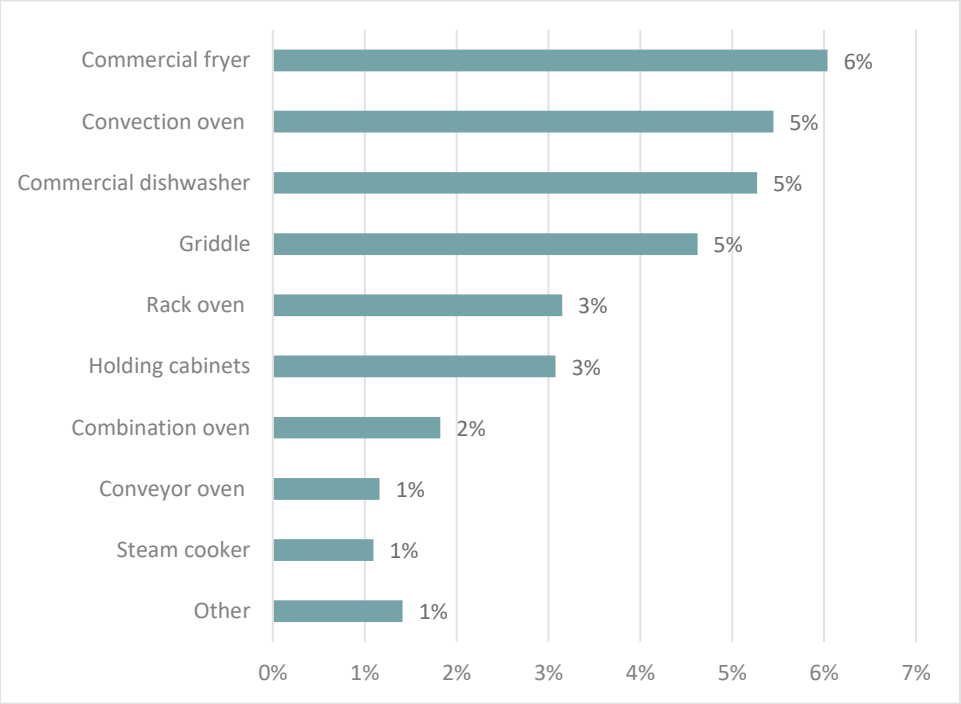
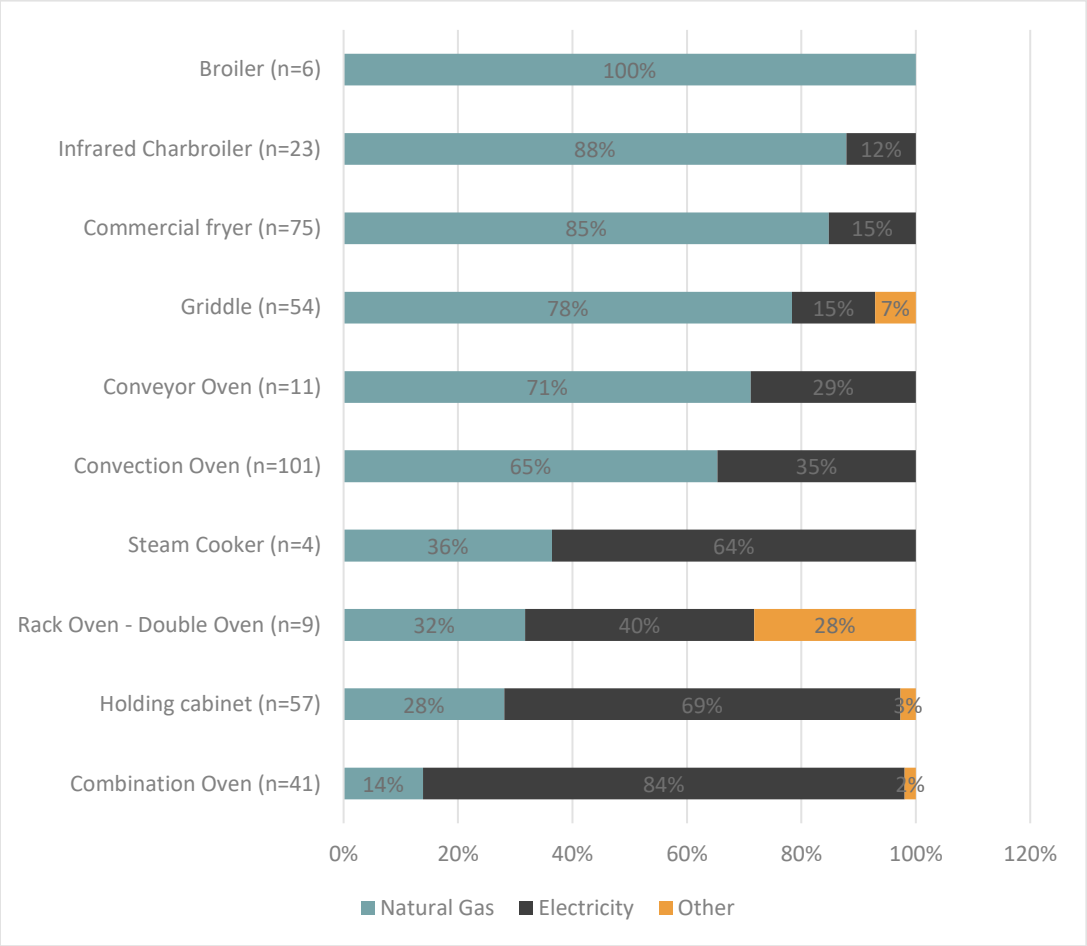


Figure 21 shows the energy source for major types of commercial kitchen equipment. Most equipment uses natural gas, but some types, such as combination ovens and holding cabinets, commonly use electricity.

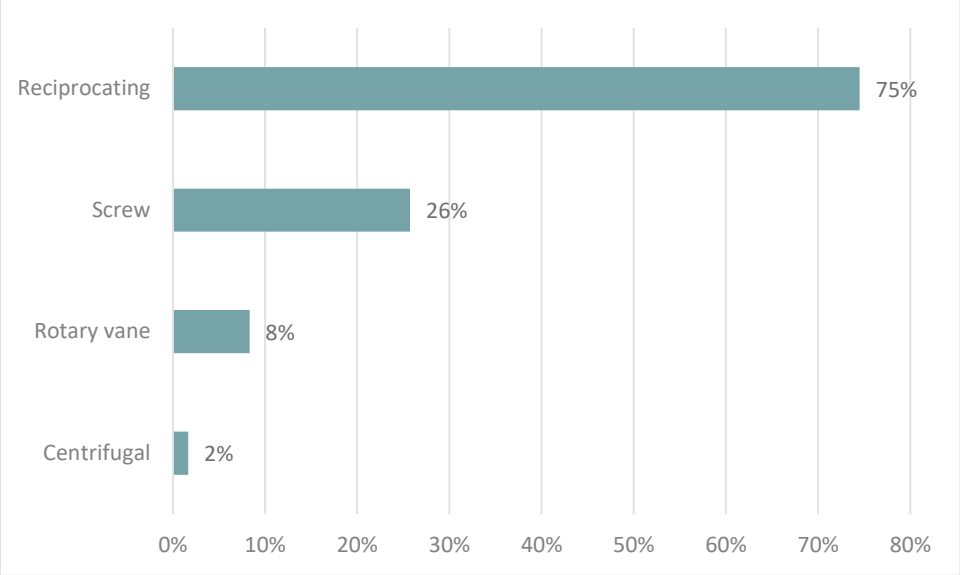
FIGURE 21. ENERGY SOURCE OF COMMERCIAL KITCHEN EQUIPMENT



3.10 COMPRESSED AIR

Five percent of Illinois C&I facilities have compressed air systems. As shown in Figure 22, reciprocating compressed air systems are the most common among facilities.

FIGURE 22. TYPES OF COMPRESSED AIR SYSTEMS (N=60)



The study team found the following:

- Approximately three-quarters (76%) of facilities do not have driers in their compressed air systems.
- Refrigerated dryers are by far the most common (22%) compared to membrane dryers (2%). Of the compressed air systems that have refrigerated dryers, 52% had cycling dryers and 48% and non-cycling dryers.
- Eighteen percent of systems had low pressure drop filters.
- Eleven percent of systems had zero loss condensate drains.
- The team found that 76% of systems had a storage tank receiver.

4 Willingness to Participate

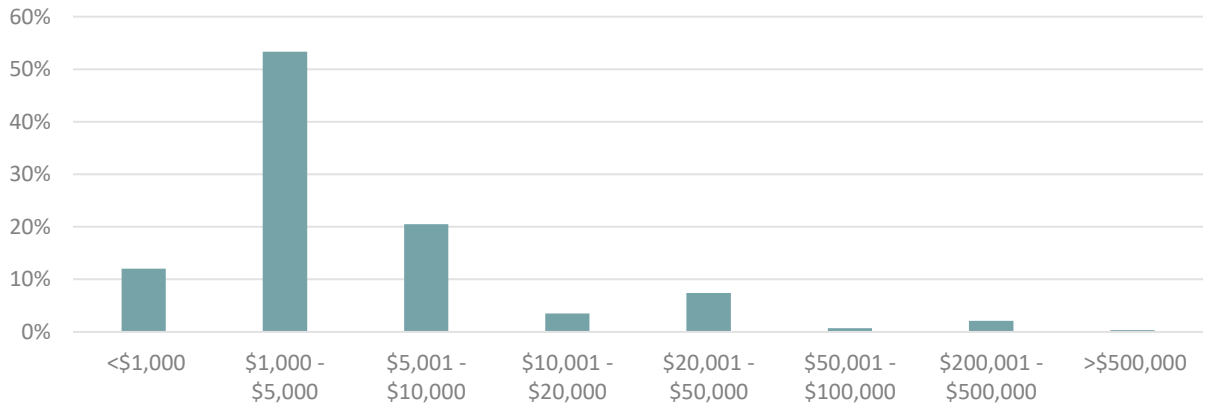
Online survey participants were asked a variety of questions to determine their willingness to participate (WTP) in energy efficiency. These willingness-to-participate questions helped to determine common barriers to prevent participation, incentive levels that would encourage participation, and awareness of certain energy efficiency measures. A total of 288 survey responses inform the results. While the detailed results in the appendix provide breakouts by several categories (electric utility, small vs large consumption categories, and commercial vs industrial), users should be cautious in using these more detailed break-outs due to small counts of respondents in some categories or for specific survey questions.

The WTP combined utility results asked a variety of questions, including background on financial criteria to make energy efficiency choices in equipment. Equipment types include heating and cooling, water heating, and refrigeration. A module focused on advanced lighting controls provides additional information regarding respondent experiences and decisions regarding past or future advanced lighting control opportunities.

4.1 WILLINGNESS TO PARTICIPATE IN ENERGY EFFICIENCY

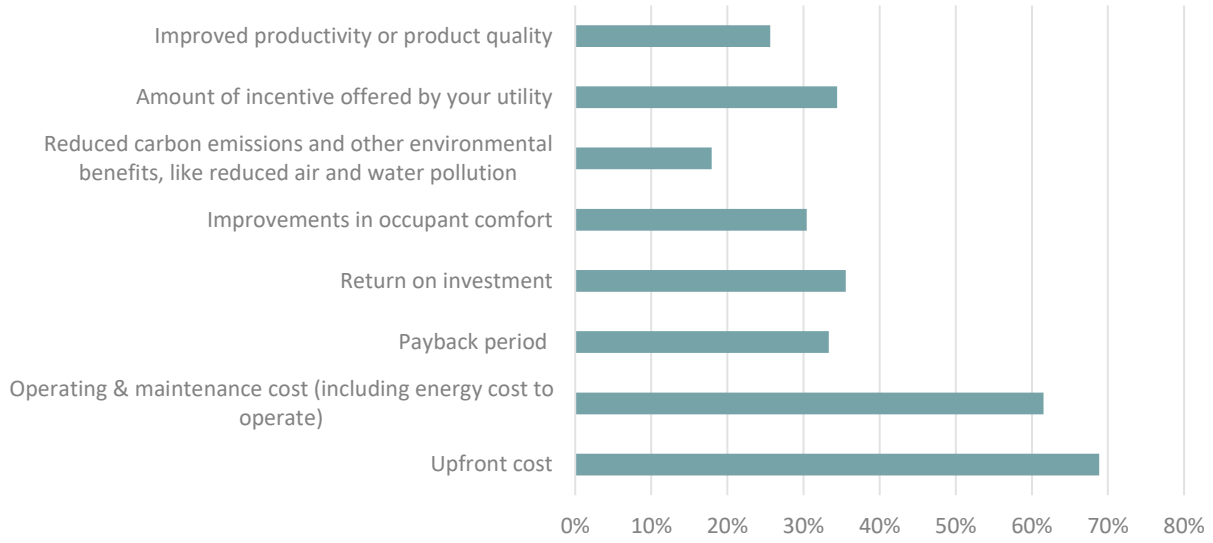
Survey participants were asked to indicate what dollar amount their organization would consider an investment to be a "major" investment. Major investments were defined as those that involve a more rigorous corporate approval process, and/or more careful consideration of costs and benefits. Figure 23 shows the results of this question. The majority of participants (53 percent) answered $1,000 to $5,000.

FIGURE 23. DOLLAR AMOUNTS ORGANIZATIONS CONSIDER TO BE A "MAJOR" INVESTMENT



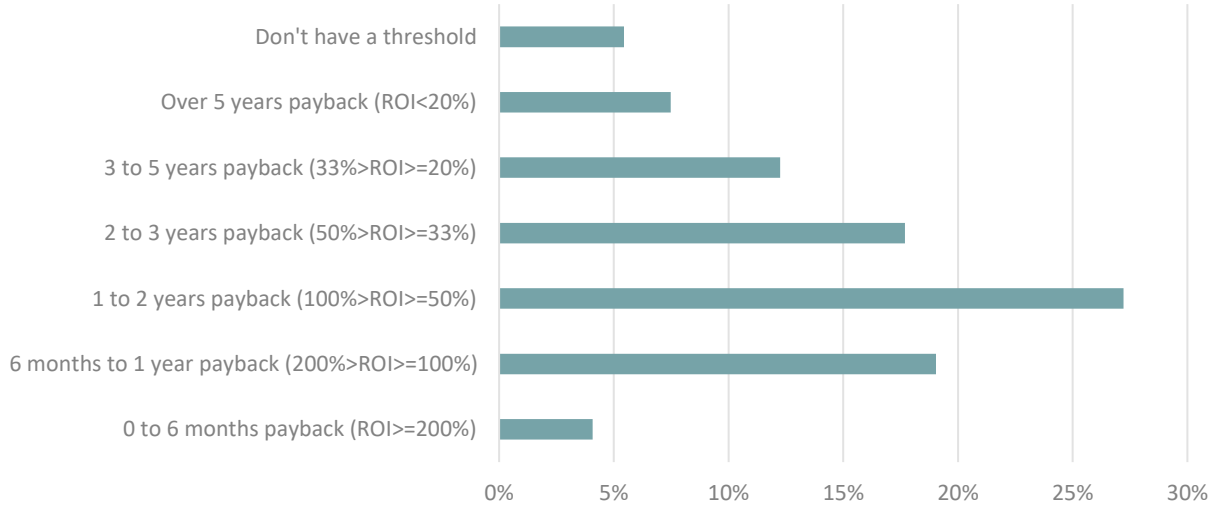
35 percent of survey respondents' organizations made a major energy-related investment in the past three years. Participants were asked the factors that are most important to their organizations when making a major energy-related investment. Note that participants were allowed to select up to four choices. Results are shown in Figure 24. The two most common responses were upfront cost and operating and maintenance cost.

FIGURE 24. FACTORS THAT ARE MOST IMPORTANT TO ORGANIZATIONS WHEN MAKING A MAJOR ENERGY-RELATED INVESTMENT



For those participants selecting that payback period or return on investment was a deciding factor when making a major energy-related investment, a second question was asked to determine the typical threshold, in terms of the payback period, the organization uses when deciding to proceed with a major energy-related investment. The most common response was a payback period of one to two years, or a return on investment between 50 and 100 percent, shown in Figure 25.

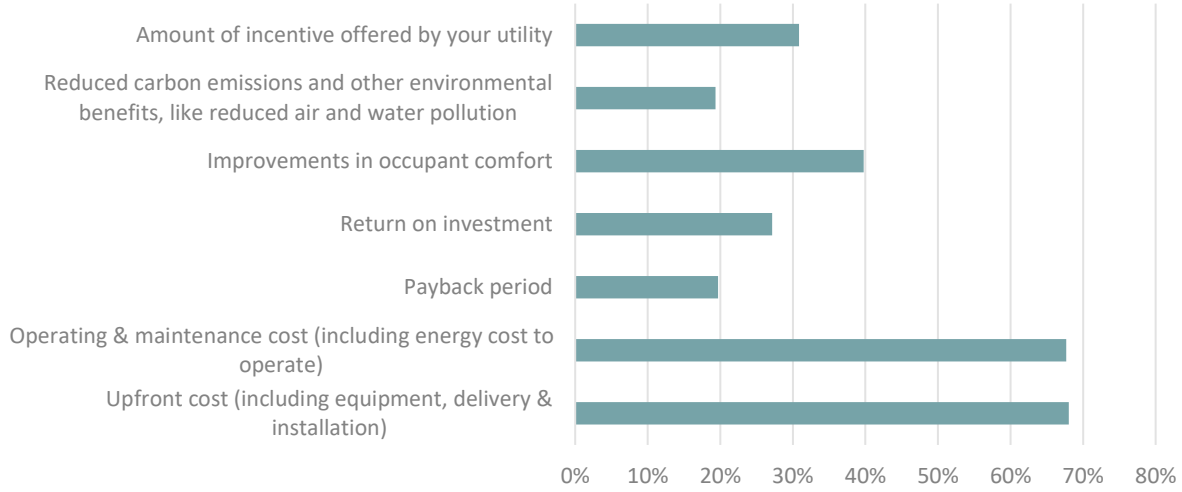
FIGURE 25. TYPICAL PAYBACK PERIOD ORGANIZATIONS USE WHEN DECIDING TO PROCEED WITH A MAJOR ENERGY-RELATED INVESTMENT



53 percent of survey respondents stated that their organization had made a minor energy-related investment in the past three years. Participants were asked the factors that are most important to their organizations when making a minor energy-related investment. Note that participants were allowed to

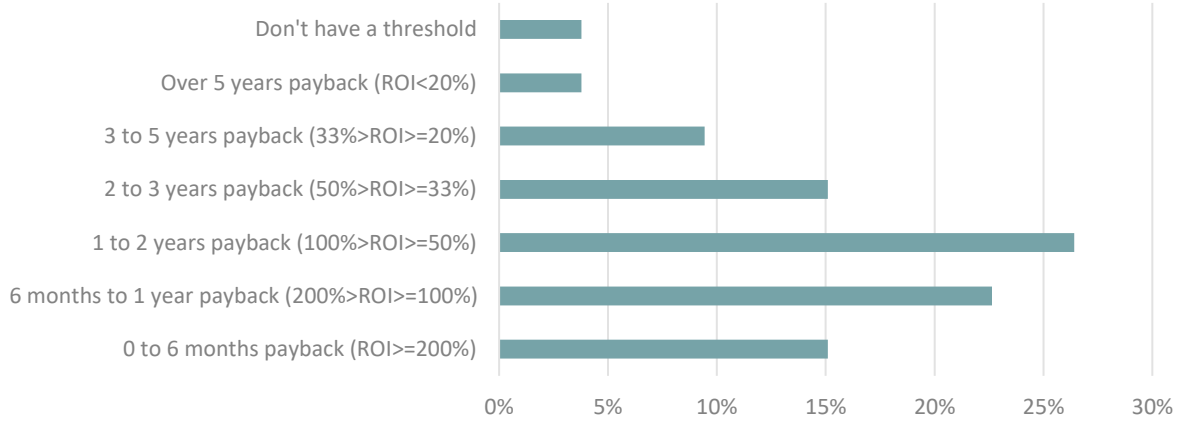
select up to four choices. Results are shown in Figure 26. The two most common responses were upfront cost and operating and maintenance cost.

FIGURE 26. FACTORS THAT ARE MOST IMPORTANT TO ORGANIZATIONS WHEN MAKING A MINOR ENERGY-RELATED INVESTMENT



For those participants selecting that payback period or return on investment was a deciding factor when making a minor energy-related investment, a second question was asked to determine the typical threshold, in terms of the payback period, the organization uses when deciding to proceed with a minor energy-related investment. The most common response was a payback period of one to two years, or a return on investment between 50 and 100 percent, shown in Figure 27.

FIGURE 27. TYPICAL PAYBACK PERIOD ORGANIZATIONS USE WHEN DECIDING TO PROCEED WITH A MINOR ENERGY-RELATED INVESTMENT

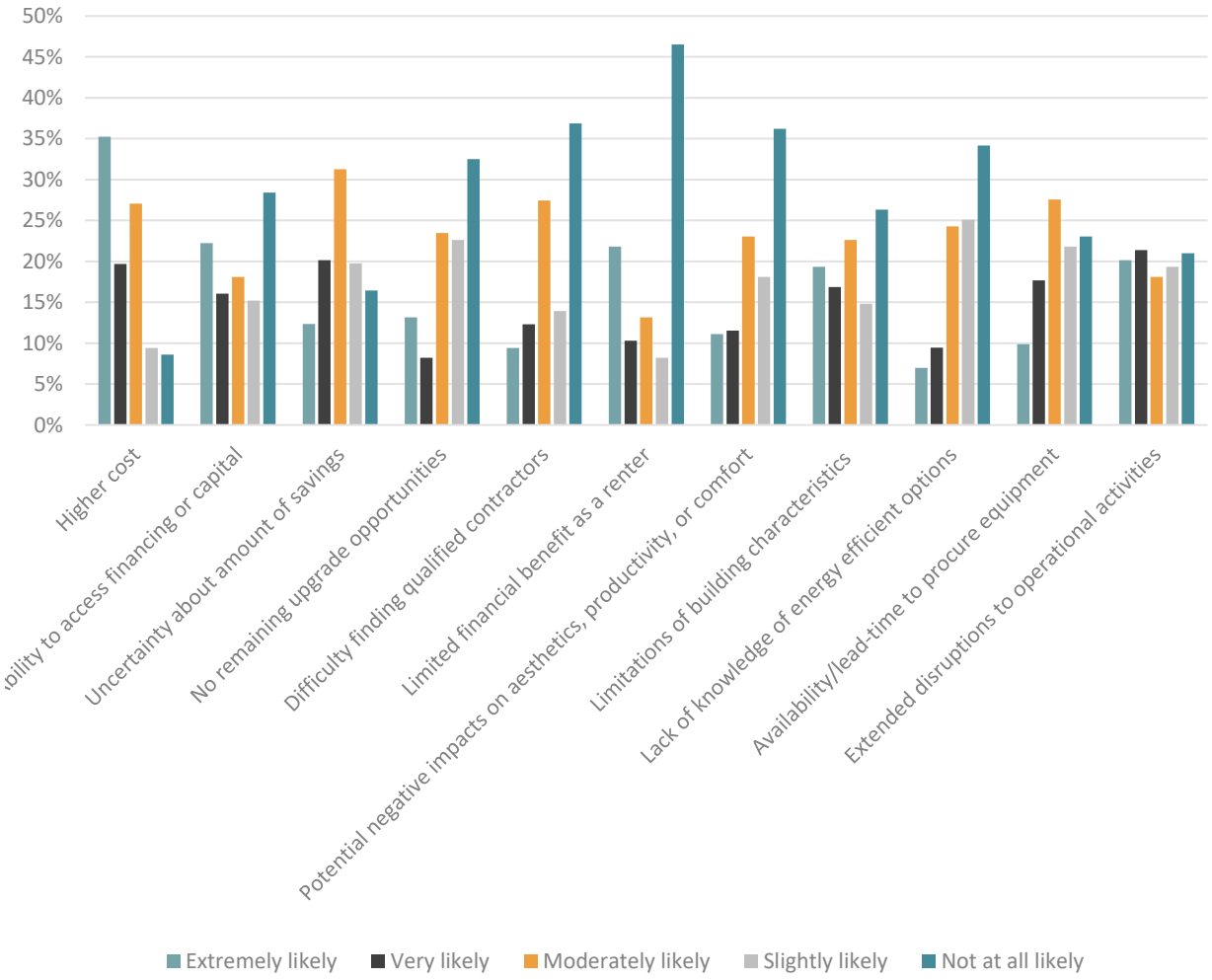


4.2 HEATING AND COOLING

Survey participants were asked the likelihood of several factors preventing them from replacing their broken HVAC equipment with a high-efficiency model. These factors included a higher cost, ability to access financing or capital, uncertainty about the amount of savings, no remaining upgrade opportunities, difficulty finding qualified contractors, limited financial benefit as a renter, potential negative impacts on aesthetics, productivity, or comfort, limitations of building characteristics, lack of knowledge of energy efficient options, ability/lead-time to procure equipment, and extended disruptions to operational activities.

Results are shown in Figure 28. The greatest overall barrier was the higher cost, with 82 percent of participants responding "moderately likely" or higher.

FIGURE 28. LIKELIHOOD OF CERTAIN BARRIERS PREVENTING SURVEY PARTICIPANTS FROM REPLACING BROKEN HVAC EQUIPMENT WITH A HIGH-EFFICIENCY MODEL

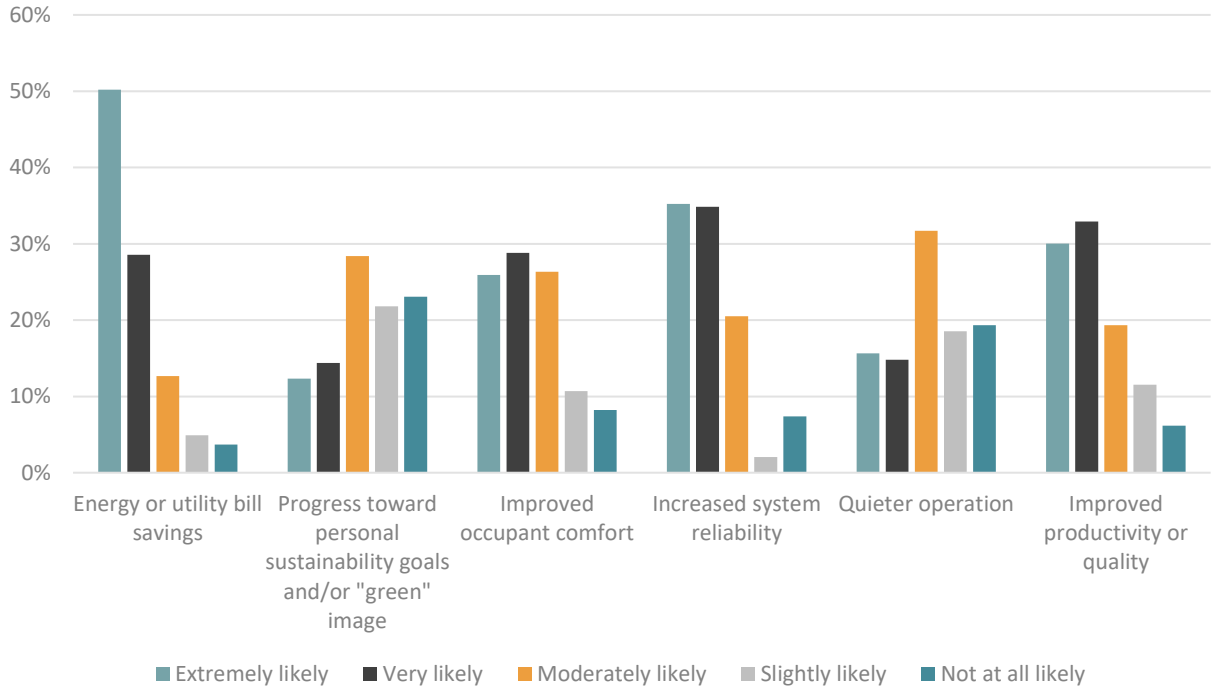


Participants were also asked the likelihood of several factors motivating them to replace their broken HVAC system with a high-efficiency model. These factors included energy or utility bill savings, progress

toward personal sustainability goals and/or "green" image, improved occupant comfort, increased system reliability, quieter operation, and improved productivity or quality.

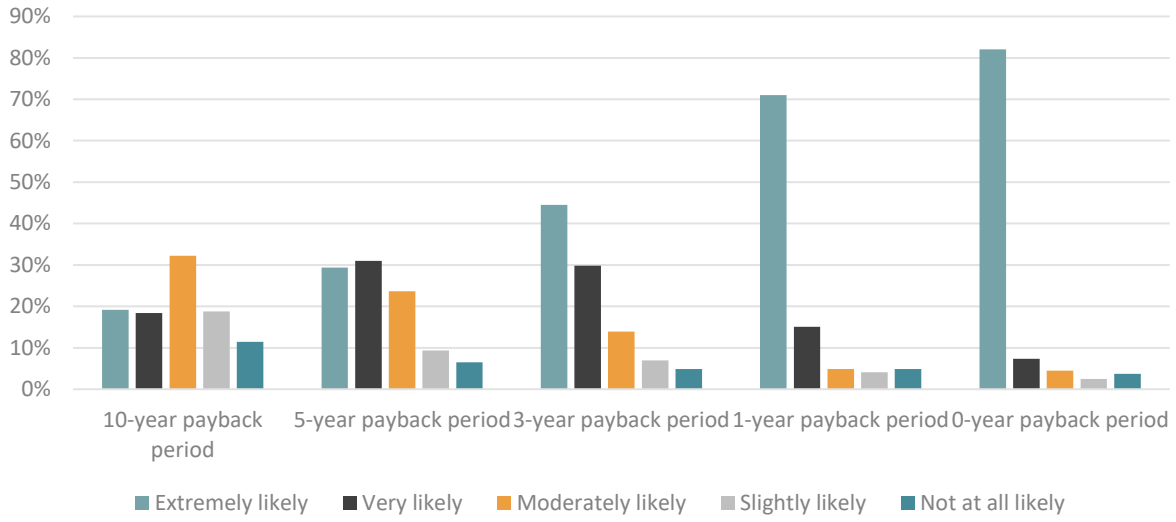
Error! Reference source not found. Figure 29 shows the results of these questions. The factors that were the most likely to motivate survey participants to upgrade HVAC equipment were energy or utility bill savings and increased system reliability, with 91 percent of participants responding "moderately likely" or higher for these choices.

FIGURE 29. LIKELIHOOD OF CERTAIN FACTORS MOTIVATING SURVEY PARTICIPANTS TO REPLACE BROKEN HVAC EQUIPMENT WITH A HIGH-EFFICIENCY MODEL



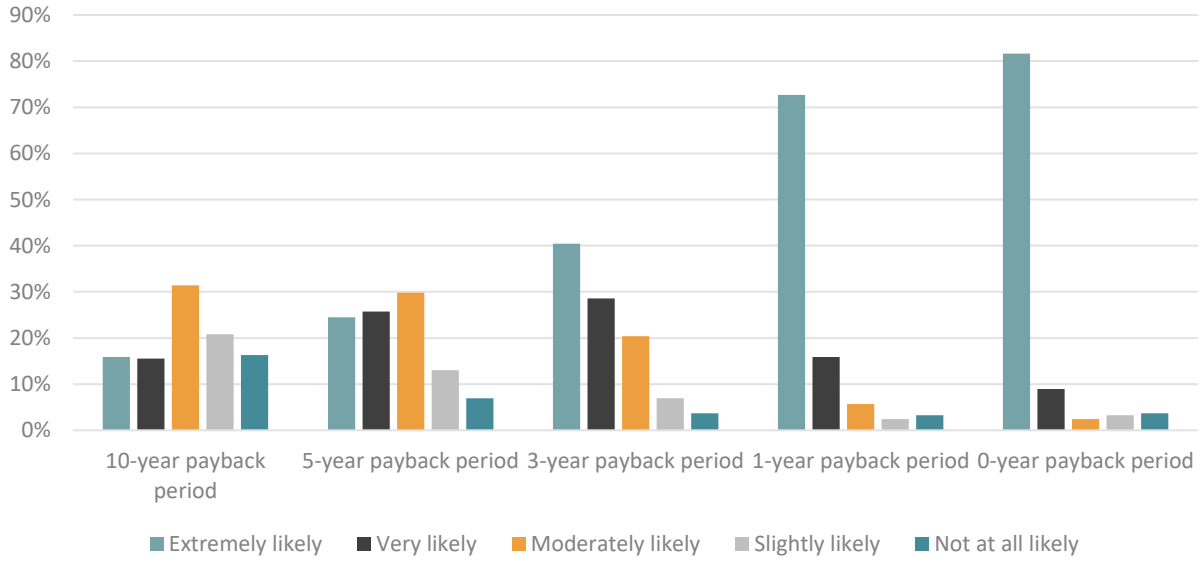
Survey participants were asked how likely they would be to purchase a high-efficiency HVAC system at different incentive levels and payback periods. Payback periods included 10 years (10% ROI), 5 years (20% ROI), 3 years (33% ROI), 1 year (100% ROI), and 0 years (instant ROI). As shown in Figure 30, the likelihood of participating increases as the incentive amount increases. 82 percent of participants responded that they would be extremely likely to purchase a high efficiency model if there was a 0-year payback period.

FIGURE 30. LIKELIHOOD OF PURCHASING A HIGH EFFICIENCY HVAC SYSTEM AT DIFFERENT INCENTIVE LEVELS



Survey participants were asked how likely they would be to purchase a minor high-efficiency HVAC improvement at different incentive levels and payback periods. Payback periods included 10 years (10% ROI), 5 years (20% ROI), 3 years (33% ROI), 1 year (100% ROI), and 0 years (instant ROI). As shown in Figure 31, the likelihood of participating increases as the incentive amount increases. 82 percent of participants responded that they would be extremely likely to purchase a high efficiency model if there was a 0-year payback period.

FIGURE 31. LIKELIHOOD OF PURCHASING A MINOR HIGH EFFICIENCY HVAC IMPROVEMENT AT DIFFERENT INCENTIVE LEVELS

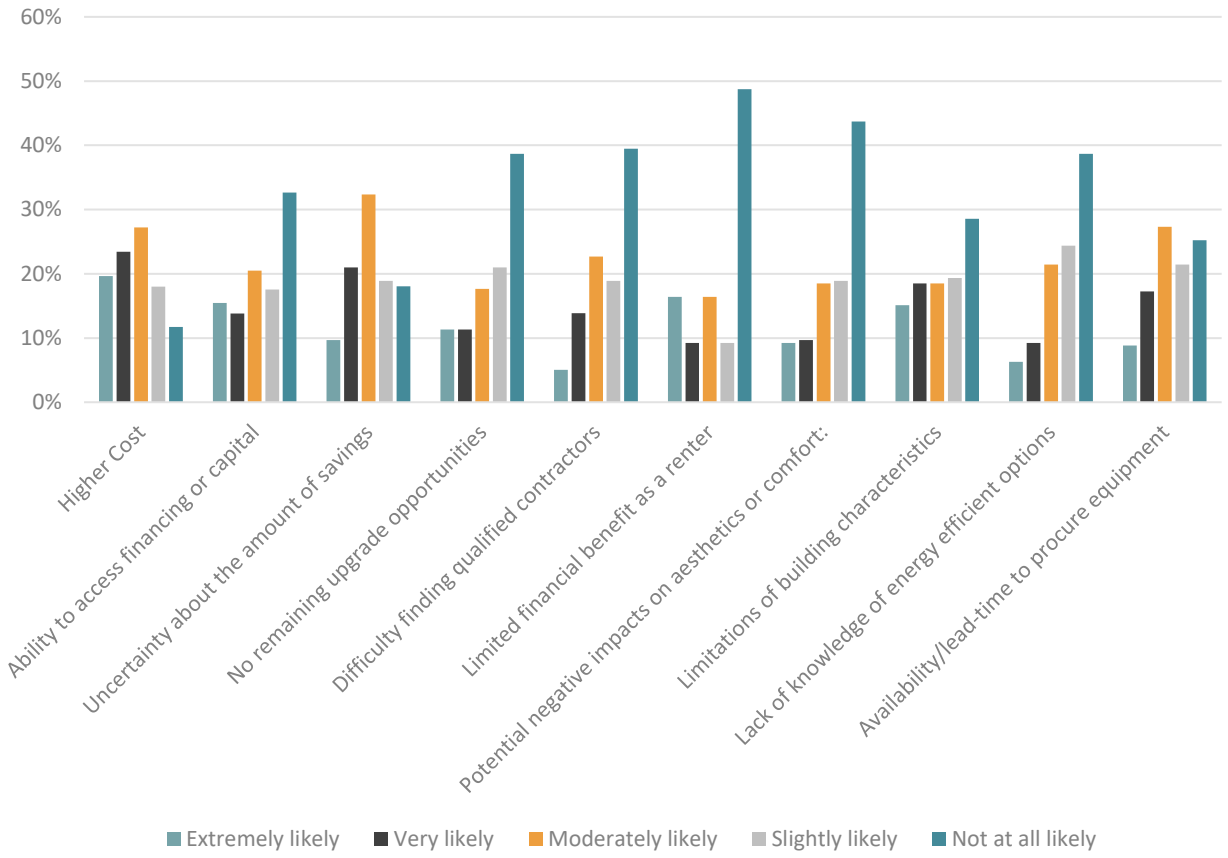


4.3 WATER HEATING

Survey participants were asked the likelihood of several factors preventing them from replacing their broken water heater with a high-efficiency water heater instead of a standard-efficiency water heater. These factors included a higher cost, ability to access financing or capital, uncertainty about the amount of savings, no remaining upgrade opportunities, difficulty finding qualified contractors, limited financial benefit as a renter, potential negative impacts on aesthetics or comfort, limitations of building characteristics, lack of knowledge of energy efficient options, and availability/lead-time to procure equipment.

The greatest overall barrier was the higher cost, with 70 percent of participants responding "moderately likely" or higher, as can be seen in Figure 32.

FIGURE 32. LIKELIHOOD OF CERTAIN BARRIERS PREVENTING SURVEY PARTICIPANTS FROM REPLACING BROKEN WATER HEATER WITH A HIGH-EFFICIENCY WATER HEATER



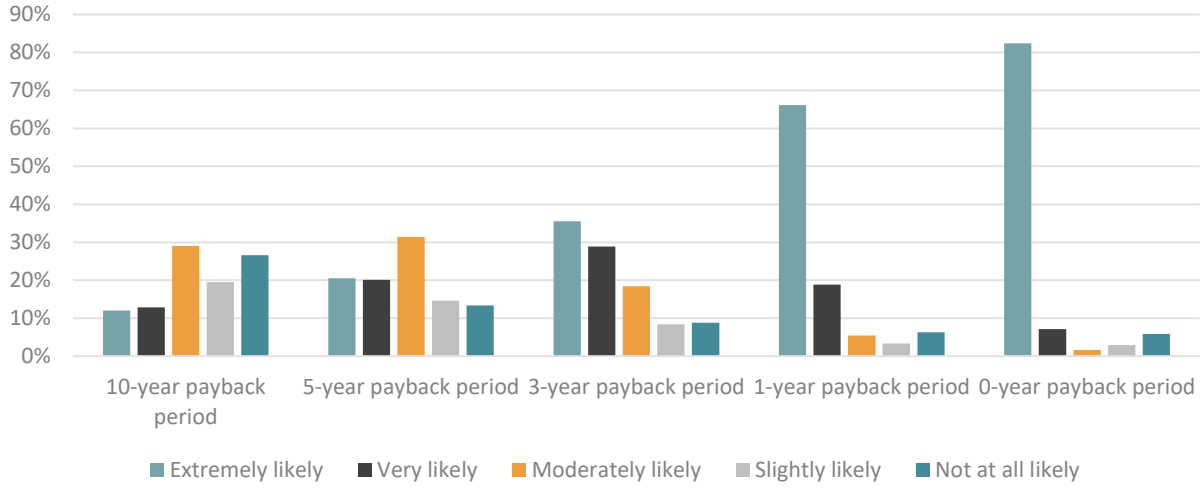
Participants were also asked the likelihood of several factors motivating them to replace their broken water heater with a high-efficiency model. These factors included energy or utility bill savings, progress toward personal sustainability goals and/or "green" image, greater reliability over a standard efficiency system, and improved water heater performance over a standard efficiency system.

Figure 33 shows how the greatest motivating factor was energy or utility bill savings, with 91 percent of participants responding "moderately likely" or higher.

FIGURE 33. LIKELIHOOD OF CERTAIN FACTORS MOTIVATING SURVEY PARTICIPANTS TO REPLACE BROKEN WATER HEATER WITH A HIGH-EFFICIENCY MODEL

Survey participants were asked how likely they would be to purchase a high-efficiency water heater at different incentive levels and payback periods. Payback periods included 10 years (10% ROI), 5 years (20% ROI), 3 years (33% ROI), 1 year (100% ROI), and 0 years (instant ROI). As shown in Figure 34, the likelihood of participating increases as the incentive amount increases. 82 percent of participants responded that they would be extremely likely to purchase a high efficiency model if there was a 0-year payback period.

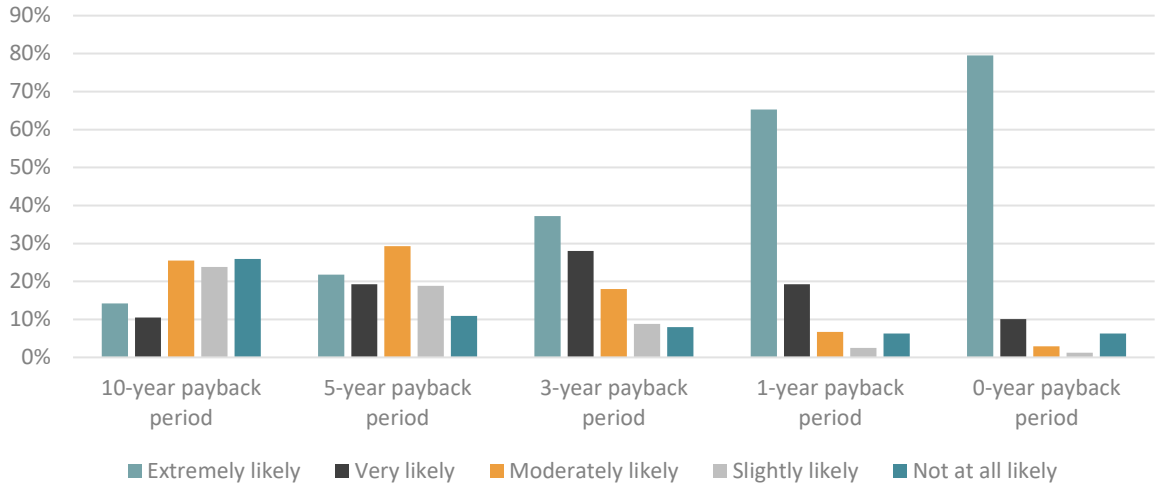
FIGURE 34. LIKELIHOOD OF PURCHASING A HIGH EFFICIENCY WATER HEATER AT DIFFERENT INCENTIVE LEVELS



Survey participants were asked how likely they would be to purchase a minor high-efficiency water heating improvement at different incentive levels and payback periods. Payback periods included 10 years (10% ROI), 5 years (20% ROI), 3 years (33% ROI), 1 year (100% ROI), and 0 years (instant ROI). As shown in

Figure 35, the likelihood of participating increases as the incentive amount increases. 79 percent of participants responded that they would be extremely likely to purchase a high efficiency model if there was a 0-year payback period.

FIGURE 35. LIKELIHOOD OF PURCHASING A MINOR HIGH EFFICIENCY WATER HEATING IMPROVEMENT AT DIFFERENT INCENTIVE LEVELS

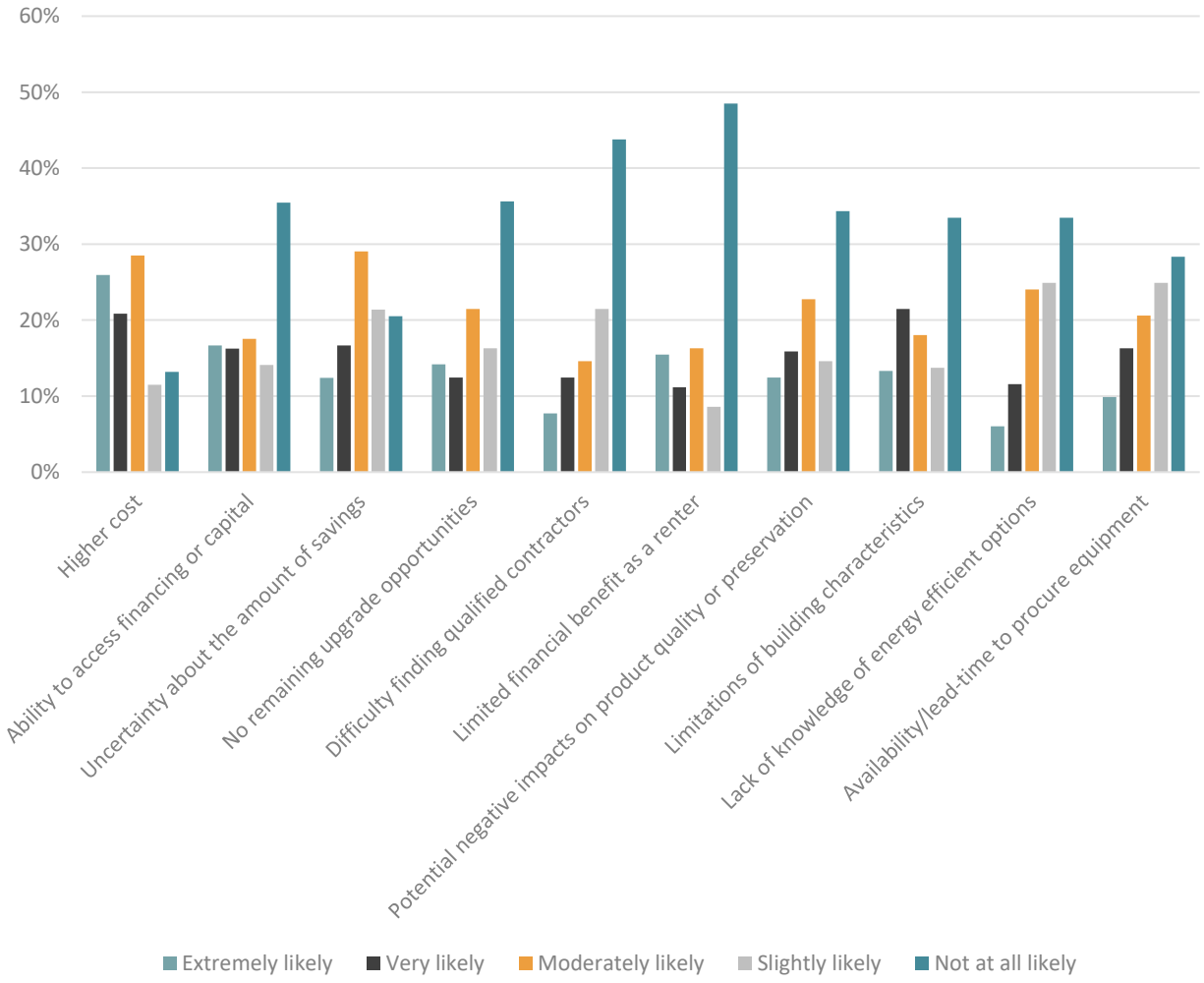


4.4 REFRIGERATION

Survey participants were asked the likelihood of several factors preventing them from replacing their broken refrigeration equipment with a high-efficiency refrigerator instead of a standard-efficiency refrigerator. These factors included a higher cost, ability to access financing or capital, uncertainty about the amount of savings, no remaining upgrade opportunities, difficulty finding qualified contractors, limited financial benefit as a renter, potential negative impacts on product quality or preservation, limitations of building characteristics, lack of knowledge of energy efficient options, and availability/lead-time to procure equipment.

The greatest overall barrier was the higher cost, with 75 percent of participants responding “moderately likely” or higher, as can be seen in Figure 36.

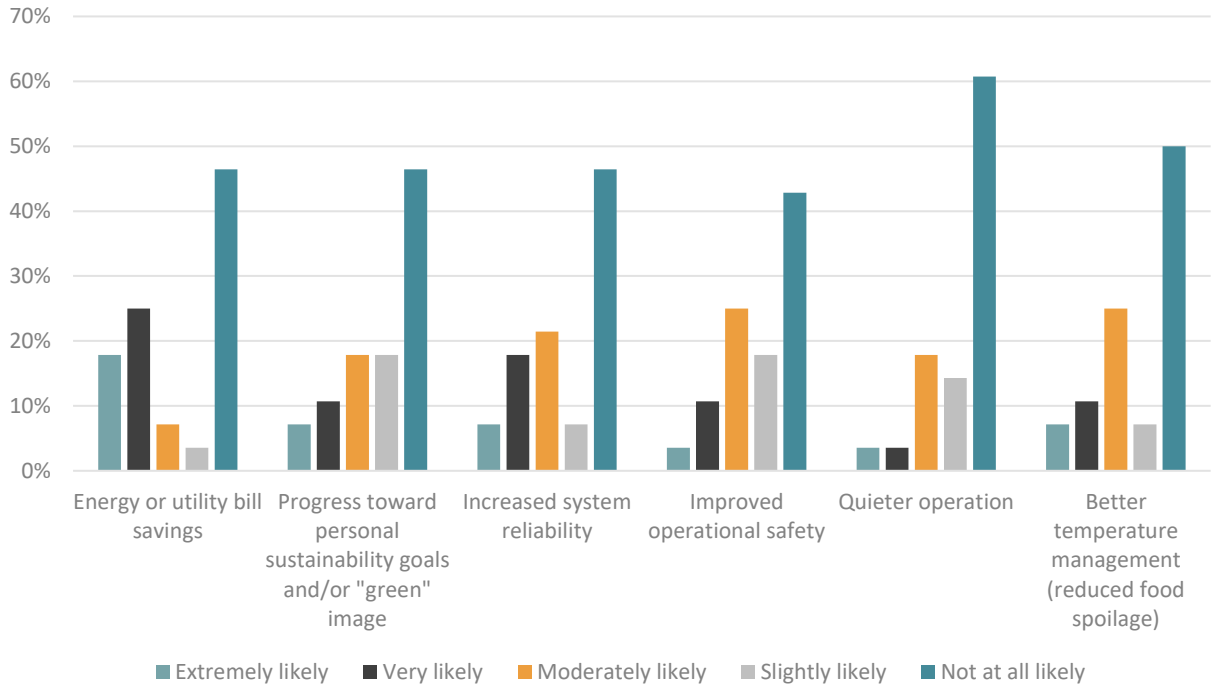
FIGURE 36. LIKELIHOOD OF CERTAIN BARRIERS PREVENTING SURVEY PARTICIPANTS FROM REPLACING BROKEN REFRIGERATION EQUIPMENT WITH A HIGH-EFFICIENCY VERSION



Participants were also asked the likelihood of several factors motivating them to replace their broken refrigeration equipment with a high-efficiency model. These factors included energy or utility bill savings, progress toward personal sustainability goals and/or "green" image, greater reliability over a standard efficiency system, and improved water heater performance over a standard efficiency system.

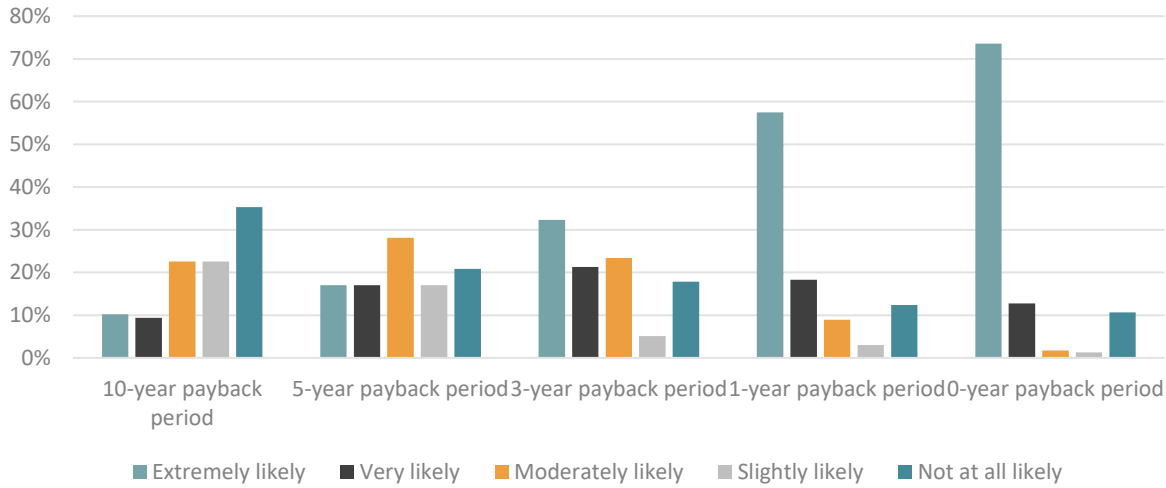
Figure 37 shows how the greatest motivating factor was energy or utility bill savings, with 50 percent of participants responding "moderately likely" or higher.

FIGURE 37. LIKELIHOOD OF CERTAIN FACTORS MOTIVATING SURVEY PARTICIPANTS TO REPLACE BROKEN REFRIGERATION EQUIPMENT WITH A HIGH-EFFICIENCY VERSION



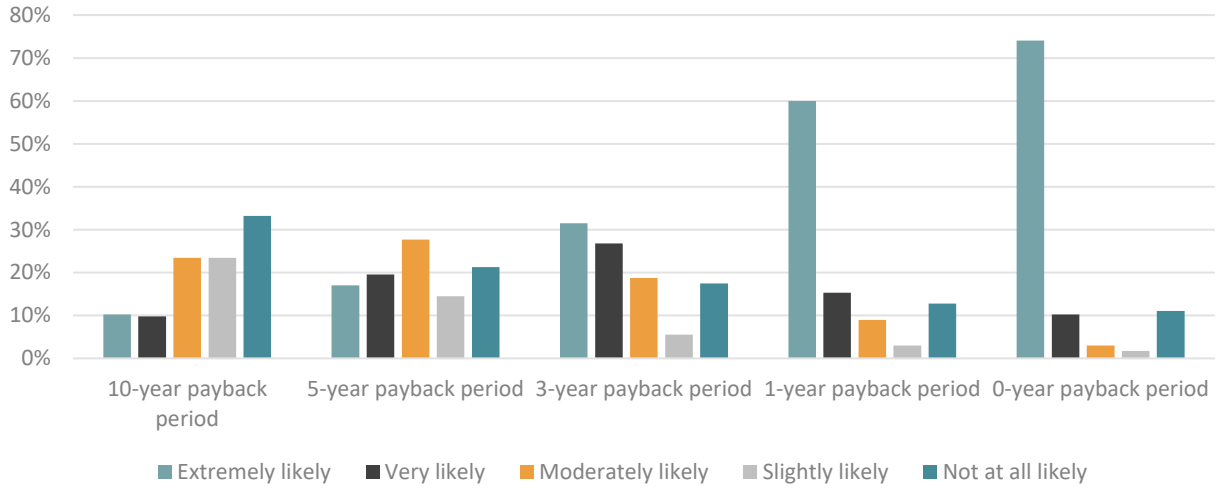
Survey participants were asked how likely they would be to purchase a high-efficiency refrigerator at different incentive levels and payback periods. Payback periods included 10 years (10% ROI), 5 years (20% ROI), 3 years (33% ROI), 1 year (100% ROI), and 0 years (instant ROI). As shown in Figure 38, the likelihood of participating increases as the incentive amount increases. 74 percent of participants responded that they would be extremely likely to purchase a high efficiency model if there was a 0-year payback period.

FIGURE 38. LIKELIHOOD OF PURCHASING HIGH EFFICIENCY REFRIGERATOR AT DIFFERENT INCENTIVE LEVELS



Survey participants were asked how likely they would be to purchase a minor high-efficiency refrigeration equipment improvement at different incentive levels and payback periods. Payback periods included 10 years (10% ROI), 5 years (20% ROI), 3 years (33% ROI), 1 year (100% ROI), and 0 years (instant ROI). As shown in Figure 39, the likelihood of participating increases as the incentive amount increases. 74 percent of participants responded that they would be extremely likely to purchase a high efficiency model if there was a 0-year payback period.

FIGURE 39. LIKELIHOOD OF PURCHASING MINOR HIGH EFFICIENCY REFRIGERATION EQUIPMENT IMPROVEMENT AT DIFFERENT INCENTIVE LEVELS



4.5 ADVANCED LIGHTING CONTROLS

The survey explained what different types of lighting controls were and asked participants if they were familiar with these types of control before the survey. The percentage of survey participants who were aware versus not aware of each type of lighting control are shown in Figure 40. The majority of respondents were aware of basic and stand-alone sensor controls. Only about half of respondents were aware of luminaire-level lighting and networked lighting controls.

FIGURE 40. AWARENESS OF TYPES OF LIGHTING CONTROLS

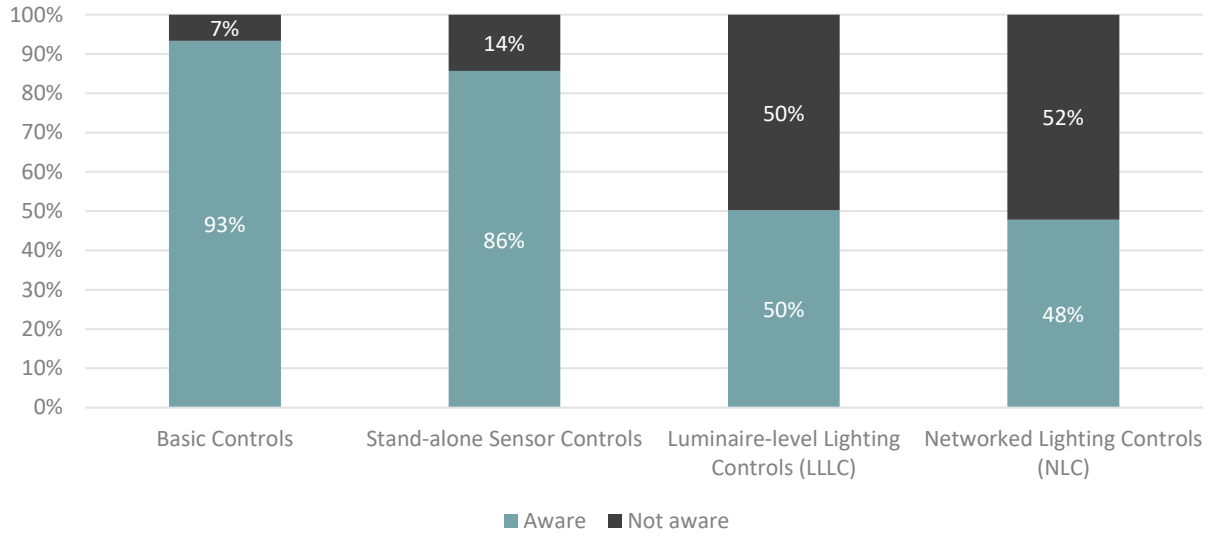
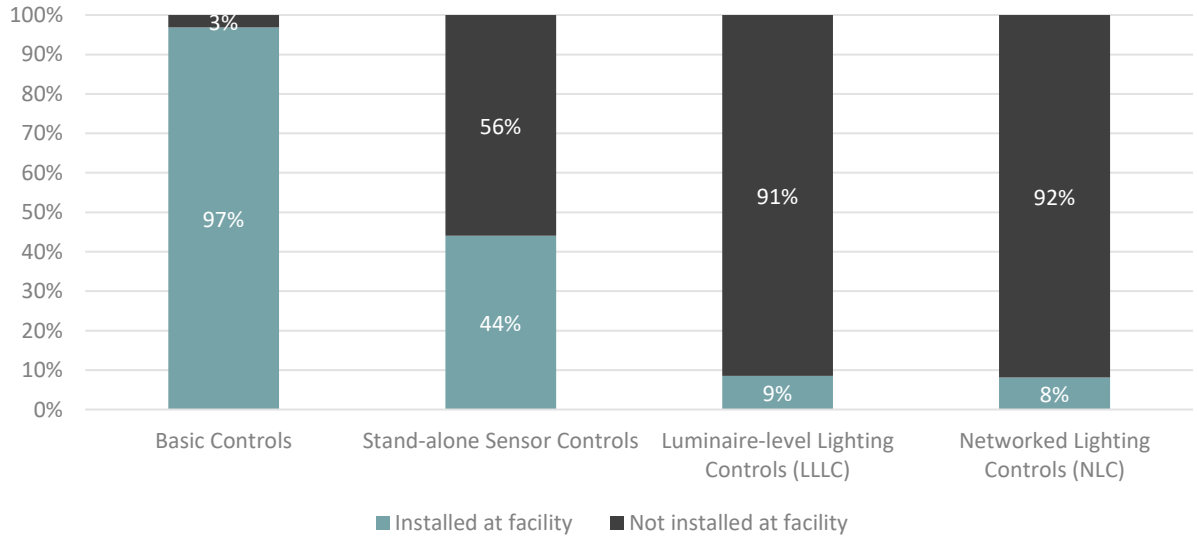


Figure 41 shows that the basic controls are already installed at 97 percent of survey participants' facilities. The majority of respondents do not have luminaire-level lighting and networked lighting controls at their facilities.

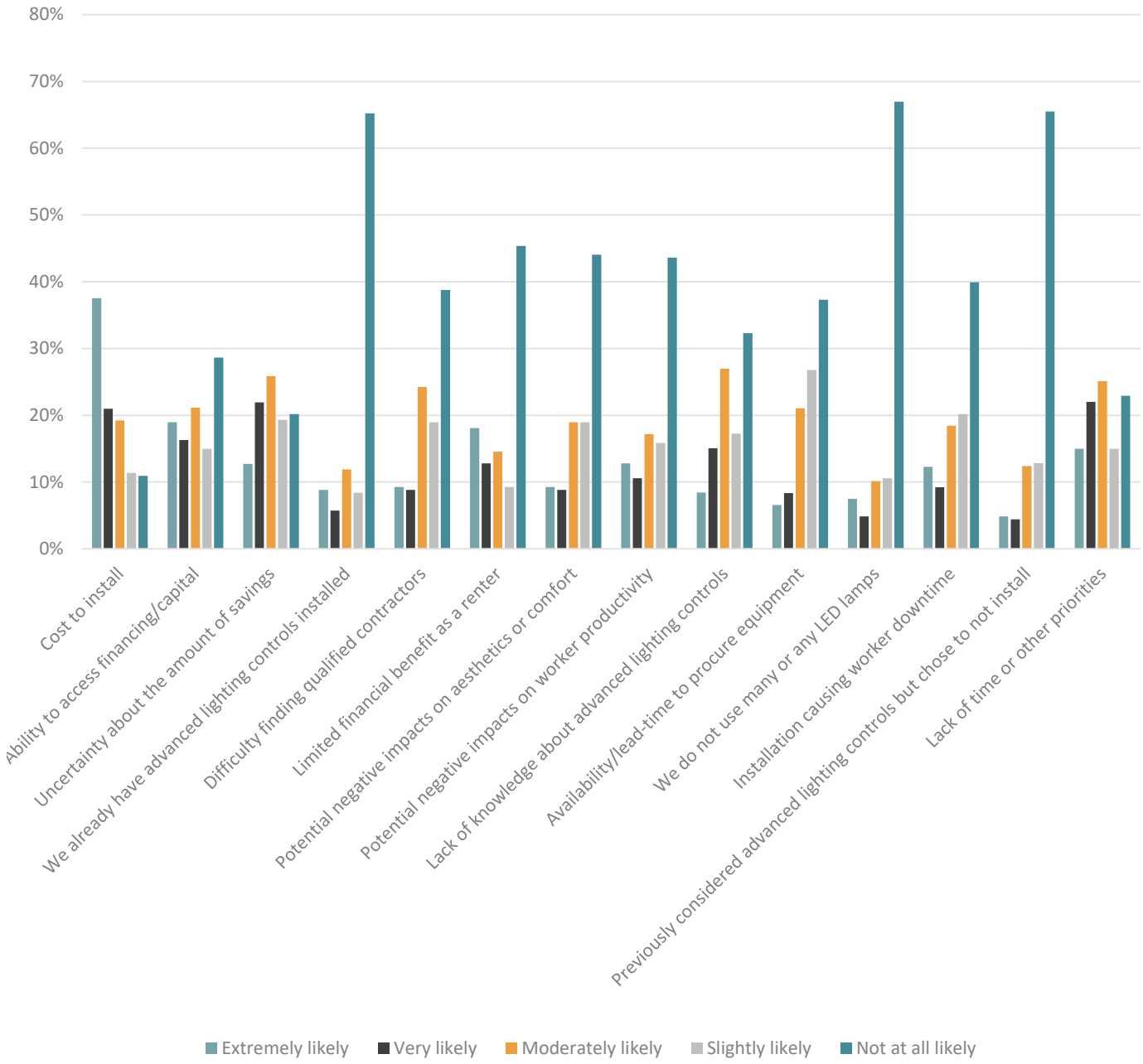
FIGURE 41. TYPES OF LIGHTING CONTROLS ALREADY INSTALLED AT SURVEY PARTICIPANTS' FACILITY



Survey participants were asked the likelihood of several factors preventing them from installing advanced lighting controls. These factors included a cost to install, ability to access financing or capital, uncertainty about the amount of savings, no remaining upgrade opportunities, difficulty finding qualified contractors, limited financial benefit as a renter, potential negative impacts on product quality or preservation, limitations of building characteristics, lack of knowledge of energy efficient options, and availability/lead-time to procure equipment.

The greatest overall barrier was the cost to install, with 78 percent of participants responding "moderately likely" or higher, as can be seen in Figure 42.

FIGURE 42. LIKELIHOOD OF CERTAIN BARRIERS PREVENTING SURVEY PARTICIPANTS FROM INSTALLING ADVANCED LIGHTING CONTROLS

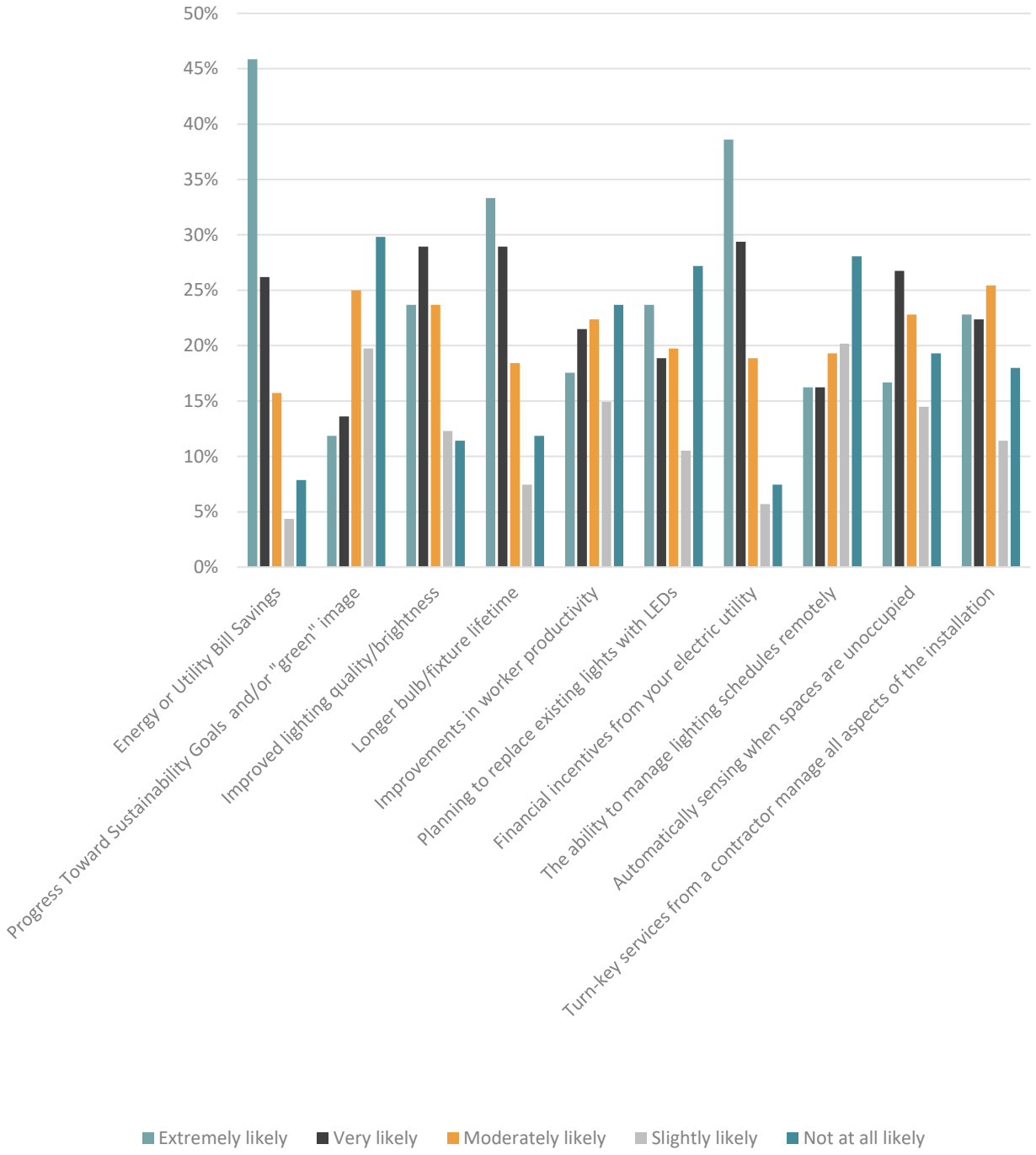


Participants were also asked the likelihood of several factors motivating them to install advanced lighting controls. These factors included energy or utility bill savings, progress toward personal sustainability goals and/or "green" image, improved lighting quality/brightness, longer bulb/fixture lifetime, improvements in worker productivity, planning to replace existing lights with LEDs, financial incentives from electric

utility, ability to manage lighting schedules remotely, automatically sensing when spaces are unoccupied, and turn-key services from a contractor manage all aspects of the installation (including permitting, incentives, and other paperwork).

Figure 43 shows how the greatest motivating factor was energy or utility bill savings, with 88 percent of participants responding "moderately likely" or higher.

FIGURE 43. LIKELIHOOD OF CERTAIN FACTORS MOTIVATING SURVEY PARTICIPANTS TO INSTALL ADVANCED LIGHTING CONTROLS



Appendix A. Willingness to Participate Detailed Responses

TABLE A-1. DOLLAR AMOUNTS ORGANIZATIONS CONSIDER TO BE A "MAJOR" INVESTMENT

F1/Q2: Please indicate at what dollar amount your organization would consider an investment to be a "major" investment. Major investments are those that involve a more rigorous corporate approval process, and/or more careful consideration of costs and benefits.

Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
<$1,000	34	12%	14%	11%	8%	14%	5%	13%	10%	9%
$1,000 - $5,000	151	53%	60%	50%	53%	58%	33%	55%	39%	65%
$5,001 - $10,000	58	20%	17%	22%	20%	19%	25%	19%	24%	26%
$10,001 - $20,000	10	4%	1%	5%	5%	3%	5%	3%	10%	0%
$20,001 - $50,000	21	7%	5%	8%	8%	4%	20%	7%	15%	0%
$50,001 - $100,000	2	1%	0%	1%	1%	0%	4%	1%	0%	0%
$200,001 - $500,000	6	2%	2%	2%	3%	1%	7%	2%	2%	0%
>$500,000	1	0%	0%	1%	1%	0%	0%	0%	0%	0%
Total	**283**		**92**	**191**	**122**	**228**	**55**	**219**	**41**	**23**
Average	**$17,011**		**$10,142**	**$20,320**	**$26,587**	**$12,236**	**$36,809**	**$18,001**	**$18,400**	**$5,113**

TABLE A-2. FACTORS THAT ARE MOST IMPORTANT TO ORGANIZATIONS WHEN MAKING A MAJOR ENERGY-RELATED INVESTMENT

F2/Q3: When making a major energy-related investment, which of the following factors are most important to your organization? Please select up to four.			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Upfront cost	188	69%	80%	64%	72%	68%	74%	68%	76%	64%
Operating & maintenance cost (including energy cost to operate)	168	62%	65%	60%	64%	62%	58%	61%	71%	55%
Payback period	91	33%	38%	31%	30%	34%	30%	33%	32%	36%
Return on investment	97	36%	42%	33%	37%	34%	43%	34%	37%	45%
Improvements in occupant comfort	83	30%	20%	35%	34%	30%	32%	31%	29%	32%
Reduced carbon emissions and other environmental benefits, like reduced air and water pollution	49	18%	12%	21%	19%	18%	19%	18%	21%	14%
Amount of incentive offered by your utility	94	34%	38%	33%	32%	34%	38%	35%	32%	36%
Improved productivity or product quality	70	26%	22%	27%	30%	24%	34%	26%	29%	18%
Other factors	3	1%	1%	1%	2%	1%	0%	1%	0%	0%
Don't know	10	4%	3%	4%	3%	5%	0%	3%	5%	5%
***Total Respondents**	***273***		***89***	***184***	***118***	***220***	***53***	***213***	***38***	***22***

F2/Q3: When making a major energy-related investment, which of the following factors are most important to your organization? Please select up to four.			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Other Factors (specify):										
Longevity	*1*		*100%*	*0%*	*0%*	*50%*	*NR*	*50%*	*NR*	*NR*
All of the Above	*1*		*0%*	*100%*	*100%*	*50%*	*NR*	*50%*	*NR*	*NR*
Other Subtotal	***2***		***1***	***1***	***1***	***2***	***0***	***2***	***0***	***0***

TABLE A-3. TYPICAL PAYBACK PERIOD ORGANIZATIONS USE WHEN DECIDING TO PROCEED WITH A MAJOR ENERGY-RELATED INVESTMENT

F3/Q4: What is the typical threshold, in terms of the payback period, your organization uses when deciding to proceed with a major energy-related investment?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
[ASK IF F2 = 3 OR 4]										
Answer	Count	%								
0 to 6 months payback (ROI>=200%)	6	4%	5%	3%	3%	5%	0%	5%	0%	0%
6 months to 1 year payback (200%>ROI>=100%)	28	19%	17%	20%	25%	19%	19%	19%	24%	14%
1 to 2 years payback (100%>ROI>=50%)	40	27%	31%	25%	27%	26%	32%	28%	19%	36%
2 to 3 years payback (50%>ROI>=33%)	26	18%	21%	16%	12%	19%	13%	14%	24%	36%
3 to 5 years payback (33%>ROI>=20%)	18	12%	10%	13%	13%	10%	19%	14%	5%	7%
Over 5 years payback (ROI<20%)	11	7%	7%	8%	8%	7%	10%	7%	10%	7%

F3/Q4: What is the typical threshold, in terms of the payback period, your organization uses when deciding to proceed with a major energy-related investment? [ASK IF F2 = 3 OR 4]										
Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Don't have a threshold	8	5%	7%	4%	5%	7%	0%	5%	10%	0%
Don't know	10	7%	2%	10%	7%	7%	6%	7%	10%	0%
Total	**147**		**58**	**89**	**60**	**116**	**31**	**112**	**21**	**14**

TABLE A-4. PERCENTAGE OF ORGANIZATIONS THAT HAVE MADE A MAJOR ENERGY-RELATED INVESTMENT IN PAST 3 YEARS

F4/Q5: Has your organization made a major energy-related investment in the past three years?										
Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Yes	97	35%	40%	33%	36%	31%	53%	35%	33%	41%
No	169	62%	56%	64%	62%	65%	47%	62%	67%	50%
Don't know	8	3%	3%	3%	2%	4%	0%	3%	0%	9%
Total	**274**		**89**	**185**	**118**	**221**	**53**	**213**	**39**	**22**

TABLE A-5. FACTORS THAT ARE MOST IMPORTANT TO ORGANIZATIONS WHEN MAKING A MINOR ENERGY-RELATED INVESTMENT

F5/Q6: When choosing to make a minor energy-related investment, which of the following factors are most

important to your organization? Please select up to four. Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Upfront cost (including equipment, delivery & installation)	183	68%	72%	66%	69%	68%	68%	67%	68%	73%
Operating & maintenance cost (including energy cost to operate)	182	68%	70%	66%	66%	67%	70%	66%	79%	68%
Payback period	53	20%	27%	16%	17%	19%	23%	19%	21%	27%
Return on investment	73	27%	27%	27%	28%	28%	23%	26%	32%	27%
Improvements in occupant comfort	107	40%	35%	42%	47%	39%	43%	40%	42%	32%
Reduced carbon emissions and other environmental benefits, like reduced air and water pollution	52	19%	18%	20%	20%	20%	17%	21%	16%	14%
Amount of incentive offered by your utility	83	31%	31%	31%	28%	32%	26%	32%	24%	36%
Other factors (Specify)	3	1%	0%	2%	1%	1%	0%	1%	0%	0%
Don't know	11	4%	3%	4%	3%	5%	0%	4%	3%	5%
***Total Respondents**	***269***		***88***	***181***	***115***	***216***	***53***	***209***	***38***	***22***
Other Factors (specify):										
Potential savings from lowered energy use	*1*		*NR*	*50%*	*NR*	*50%*	*NR*	*50%*	*NR*	*NR*
Do not have decision-making authority for this	*1*		*NR*	*50%*	*NR*	*50%*	*NR*	*50%*	*NR*	*NR*
Other Subtotal	***2***		***0***	***2***	***0***	***2***	***0***	***2***	***0***	***0***

TABLE A-6. TYPICAL PAYBACK PERIOD ORGANIZATIONS USE WHEN DECIDING TO PROCEED WITH A MINOR ENERGY-RELATED INVESTMENT

F6/Q7: What is the typical threshold, in terms of the payback period or return on investment (ROI), your organization uses

when deciding to proceed with a minor energy-related investment? [ASK IF F5 = 3]										
Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
0 to 6 months payback (ROI>=200%)	8	15%	13%	17%	25%	17%	8%	15%	0%	33%
6 months to 1 year payback (200%>ROI>=100%)	12	23%	17%	28%	30%	22%	25%	21%	25%	33%
1 to 2 years payback (100%>ROI>=50%)	14	26%	42%	14%	10%	29%	17%	28%	25%	17%
2 to 3 years payback (50%>ROI>=33%)	8	15%	8%	21%	15%	15%	17%	15%	25%	0%
3 to 5 years payback (33%>ROI>=20%)	5	9%	13%	7%	5%	7%	17%	10%	13%	0%
Over 5 years payback (ROI<20%)	2	4%	0%	7%	10%	2%	8%	5%	0%	0%
Other (Specify)	0	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't have a threshold	2	4%	4%	3%	0%	5%	0%	3%	0%	17%
Don't know	2	4%	4%	3%	5%	2%	8%	3%	13%	0%
Total	**53**		**24**	**29**	**20**	**41**	**12**	**39**	**8**	**6**

TABLE A-7. PERCENTAGE OF ORGANIZATIONS THAT HAVE MADE A MINOR ENERGY-RELATED INVESTMENT IN PAST 3 YEARS

F7/Q8: Has your organization made a minor energy-related investment in the past three (3) years?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Yes	28	53%	54%	52%	45%	49%	67%	49%	88%	33%

No	23	43%	38%	48%	55%	46%	33%	46%	13%	67%
Don't know	2	4%	8%	0%	0%	5%	0%	5%	0%	0%
Total	**53**		**24**	**29**	**20**	**41**	**12**	**39**	**8**	**6**

TABLE A-8. LIKELIHOOD OF CERTAIN BARRIERS PREVENTING SURVEY PARTICIPANTS FROM REPLACING BROKEN HVAC EQUIPMENT WITH A HIGH-EFFICIENCY MODEL

HV1/Q9: How likely is it that the following factors will prevent your organization from replacing broken HVAC equipment with a high-efficiency model as opposed to a standard-efficiency model? (Such as your air conditioning system, furnace, boilers, heat pump or other primary heating or cooling equipment.)			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	**Count**	**%**								
Higher cost:										
Extremely likely	86	35%	29%	38%	35%	38%	27%	36%	34%	29%
Very likely	48	20%	23%	18%	20%	19%	21%	19%	17%	33%
Moderately likely	66	27%	26%	28%	29%	26%	31%	26%	34%	24%
Slightly likely	23	9%	9%	10%	7%	9%	12%	10%	9%	5%
Not at all likely	21	9%	13%	7%	9%	8%	10%	9%	6%	10%
Total	**244**		**78**	**166**	**107**	**192**	**52**	**188**	**35**	**21**
Our ability to access financing or capital:										
Extremely likely	54	22%	15%	25%	25%	23%	21%	24%	9%	29%
Very likely	39	16%	17%	16%	14%	16%	17%	16%	11%	29%
Moderately likely	44	18%	15%	19%	18%	17%	21%	19%	20%	5%
Slightly likely	37	15%	21%	13%	12%	16%	12%	14%	20%	19%
Not at all likely	69	28%	32%	27%	30%	28%	29%	27%	40%	19%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**
Uncertainty about the amount of savings:										
Extremely likely	30	12%	8%	15%	11%	13%	10%	12%	6%	29%
Very likely	49	20%	18%	21%	20%	20%	21%	20%	26%	10%
Moderately likely	76	31%	35%	30%	33%	33%	25%	32%	26%	38%

HV1/Q9: How likely is it that the following factors will prevent your organization from replacing broken HVAC equipment with a high-efficiency model as opposed to a standard-efficiency model? (Such as your air conditioning system, furnace, boilers, heat pump or other primary heating or cooling equipment.)			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Slightly likely	48	20%	27%	16%	13%	19%	23%	19%	23%	19%
Not at all likely	40	16%	13%	18%	23%	15%	21%	17%	20%	5%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**
No remaining upgrade opportunities:										
Extremely likely	32	13%	12%	14%	14%	15%	8%	12%	11%	24%
Very likely	20	8%	8%	8%	10%	8%	10%	9%	3%	10%
Moderately likely	57	23%	26%	22%	19%	24%	23%	25%	14%	24%
Slightly likely	55	23%	23%	22%	24%	21%	27%	22%	29%	19%
Not at all likely	79	33%	32%	33%	33%	32%	33%	32%	43%	24%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**
Difficulty finding qualified contractors:										
Extremely likely	23	9%	8%	10%	9%	10%	8%	9%	9%	19%
Very likely	30	12%	13%	12%	11%	14%	8%	12%	14%	10%
Moderately likely	67	27%	31%	26%	25%	26%	35%	27%	26%	33%
Slightly likely	34	14%	6%	17%	16%	15%	10%	14%	14%	14%
Not at all likely	90	37%	42%	34%	38%	36%	40%	38%	37%	24%
Total	**244**		**78**	**166**	**107**	**192**	**52**	**188**	**35**	**21**
Limited financial benefit as a renter:										
Extremely likely	53	22%	17%	24%	18%	24%	15%	22%	17%	24%
Very likely	25	10%	13%	9%	9%	12%	4%	11%	0%	19%
Moderately likely	32	13%	13%	13%	10%	14%	12%	14%	3%	19%
Slightly likely	20	8%	13%	6%	5%	9%	4%	7%	14%	10%
Not at all likely	113	47%	45%	47%	58%	41%	65%	45%	66%	29%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**

HV1/Q9: How likely is it that the following factors will prevent your organization from replacing broken HVAC equipment with a high-efficiency model as opposed to a standard-efficiency model? (Such as your air conditioning system, furnace, boilers, heat pump or other primary heating or cooling equipment.)			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	**Count**	**%**								
Potential negative impacts on aesthetics, productivity, or comfort:										
Extremely likely	27	11%	6%	13%	13%	12%	10%	9%	14%	24%
Very likely	28	12%	13%	11%	8%	12%	12%	11%	9%	24%
Moderately likely	56	23%	26%	22%	19%	23%	25%	25%	11%	29%
Slightly likely	44	18%	21%	17%	17%	17%	21%	19%	20%	5%
Not at all likely	88	36%	35%	37%	42%	37%	33%	36%	46%	19%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**
Limitations of building characteristics (e.g., no space to add equipment):										
Extremely likely	47	19%	10%	24%	23%	19%	19%	20%	17%	14%
Very likely	41	17%	23%	14%	13%	16%	21%	14%	14%	43%
Moderately likely	55	23%	19%	24%	22%	23%	23%	22%	20%	29%
Slightly likely	36	15%	18%	13%	14%	14%	17%	17%	9%	5%
Not at all likely	64	26%	29%	25%	28%	28%	19%	26%	40%	10%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**
Lack of knowledge of energy efficient options:										
Extremely likely	17	7%	8%	7%	6%	6%	10%	7%	3%	14%
Very likely	23	9%	12%	8%	6%	11%	4%	9%	11%	10%
Moderately likely	59	24%	23%	25%	27%	25%	21%	26%	14%	24%
Slightly likely	61	25%	27%	24%	25%	24%	29%	26%	23%	24%
Not at all likely	83	34%	31%	36%	36%	34%	37%	32%	49%	29%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**
Availability/lead-time to procure equipment:										
Extremely likely	24	10%	4%	13%	10%	9%	12%	10%	6%	14%

HV1/Q9: How likely is it that the following factors will prevent your organization from replacing broken HVAC equipment with a high-efficiency model as opposed to a standard-efficiency model? (Such as your air conditioning system, furnace, boilers, heat pump or other primary heating or cooling equipment.)			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Very likely	43	18%	18%	18%	14%	17%	21%	17%	17%	24%
Moderately likely	67	28%	27%	28%	34%	26%	33%	27%	31%	24%
Slightly likely	53	22%	24%	21%	18%	21%	25%	22%	26%	14%
Not at all likely	56	23%	27%	21%	24%	27%	10%	24%	20%	24%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**
Extended disruptions to operational activities:										
Extremely likely	49	20%	8%	26%	20%	19%	25%	21%	17%	19%
Very likely	52	21%	24%	20%	23%	20%	25%	22%	20%	14%
Moderately likely	44	18%	23%	16%	17%	17%	23%	18%	14%	29%
Slightly likely	47	19%	21%	19%	16%	20%	17%	18%	26%	19%
Not at all likely	51	21%	24%	19%	25%	24%	10%	21%	23%	19%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**

TABLE A-9. LIKELIHOOD OF CERTAIN FACTORS MOTIVATING SURVEY PARTICIPANTS TO REPLACE BROKEN HVAC EQUIPMENT WITH A HIGH-EFFICIENCY MODEL

HV4/Q12: How likely is it that the following factors would motivate you to replace your broken HVAC system with a high-efficiency model?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Energy or utility bill savings:										
Extremely likely	123	50%	47%	51%	61%	49%	54%	52%	51%	33%
Very likely	70	29%	33%	26%	21%	27%	35%	27%	29%	43%
Moderately likely	31	13%	14%	12%	7%	15%	6%	14%	11%	5%

HV4/Q12: How likely is it that the following factors would motivate you to replace your broken HVAC system with a high-efficiency model?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Slightly likely	12	5%	3%	6%	6%	5%	6%	4%	6%	14%
Not at all likely	9	4%	3%	4%	4%	5%	0%	4%	3%	5%
Total	**245**		**78**	**167**	**108**	**193**	**52**	**189**	**35**	**21**
Progress toward personal sustainability goals and/or "green" image:										
Extremely likely	30	12%	12%	13%	13%	10%	19%	13%	9%	10%
Very likely	35	14%	15%	14%	14%	15%	13%	14%	14%	19%
Moderately likely	69	28%	21%	32%	27%	27%	35%	26%	29%	48%
Slightly likely	53	22%	22%	22%	25%	23%	19%	22%	29%	10%
Not at all likely	56	23%	31%	19%	20%	26%	13%	25%	20%	14%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**
Improved occupant comfort:										
Extremely likely	63	26%	26%	26%	26%	23%	38%	28%	11%	33%
Very likely	70	29%	24%	31%	32%	28%	33%	29%	34%	19%
Moderately likely	64	26%	29%	25%	21%	29%	17%	25%	31%	29%
Slightly likely	26	11%	10%	11%	12%	12%	6%	10%	14%	14%
Not at all likely	20	8%	10%	7%	8%	9%	6%	9%	9%	5%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**
Increased system reliability:										
Extremely likely	86	35%	28%	39%	40%	33%	44%	35%	37%	38%
Very likely	85	35%	42%	31%	33%	35%	33%	36%	26%	43%
Moderately likely	50	20%	22%	20%	18%	22%	15%	20%	29%	10%
Slightly likely	5	2%	3%	2%	1%	2%	2%	2%	0%	5%
Not at all likely	18	7%	5%	8%	8%	8%	6%	7%	9%	5%
Total	**244**		**78**	**166**	**107**	**192**	**52**	**188**	**35**	**21**
Quieter operation:										

HV4/Q12: How likely is it that the following factors would motivate you to replace your broken HVAC system with a high-efficiency model?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	38	16%	9%	19%	17%	15%	17%	15%	14%	24%
Very likely	36	15%	14%	15%	15%	14%	17%	16%	14%	5%
Moderately likely	77	32%	40%	28%	27%	32%	29%	32%	29%	38%
Slightly likely	45	19%	15%	20%	21%	17%	23%	18%	20%	19%
Not at all likely	47	19%	22%	18%	20%	21%	13%	19%	23%	14%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**
Improved productivity or quality:										
Extremely likely	73	30%	28%	31%	32%	27%	40%	29%	31%	33%
Very likely	80	33%	29%	35%	37%	32%	35%	34%	37%	14%
Moderately likely	47	19%	23%	18%	14%	20%	17%	19%	14%	33%
Slightly likely	28	12%	10%	12%	10%	13%	8%	12%	9%	14%
Not at all likely	15	6%	9%	5%	7%	8%	0%	6%	9%	5%
Total	**243**		**78**	**165**	**106**	**191**	**52**	**187**	**35**	**21**

TABLE A-10. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY HVAC IF INCENTIVE CREATES 10-YEAR PAYBACK PERIOD

HV7a/Q15a: How likely would your organization be to replace the failed equipment with a high efficiency HVAC system if the incentive creates a payback period of 10 years (10% ROI)?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	47	19%	22%	18%	19%	16%	31%	18%	20%	29%
Very likely	45	18%	18%	19%	25%	19%	18%	21%	9%	14%

HV7a/Q15a: How likely would your organization be to replace the failed equipment with a high efficiency HVAC system if the incentive creates a payback period of 10 years (10% ROI)?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Moderately likely	79	32%	33%	32%	35%	33%	29%	32%	40%	19%
Slightly likely	46	19%	21%	18%	14%	19%	18%	17%	26%	24%
Not at all likely	28	11%	6%	14%	8%	13%	4%	12%	6%	14%
Total	**245**		**78**	**167**	**106**	**194**	**51**	**189**	**35**	**21**

TABLE A-11. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY HVAC IF INCENTIVE CREATES 5-YEAR PAYBACK PERIOD

HV7b/Q15b: How likely would your organization be to replace the failed equipment with a high efficiency HVAC system if the incentive creates a payback period of 5 years (20% ROI)? [ASK IF HV7a < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	25	13%	20%	9%	13%	15%	3%	14%	7%	7%
Very likely	76	38%	34%	40%	45%	33%	63%	40%	39%	20%
Moderately likely	58	29%	31%	28%	30%	31%	23%	25%	43%	53%
Slightly likely	23	12%	7%	14%	6%	12%	9%	13%	4%	13%
Not at all likely	16	8%	8%	8%	6%	9%	3%	8%	7%	7%
Total	**198**		**61**	**137**	**86**	**163**	**35**	**155**	**28**	**15**

TABLE A-12. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY HVAC IF INCENTIVE CREATES 3-YEAR PAYBACK PERIOD

HV7c/Q15c: How likely would your organization be to replace the failed equipment with a high efficiency HVAC system if the incentive creates a payback period of 3 years (33% ROI)?										
[ASK IF HV7b < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	37	21%	20%	22%	24%	19%	29%	24%	12%	14%
Very likely	73	42%	49%	40%	43%	39%	56%	38%	58%	50%
Moderately likely	34	20%	18%	20%	20%	23%	6%	20%	15%	29%
Slightly likely	17	10%	8%	10%	8%	11%	6%	11%	12%	0%
Not at all likely	12	7%	4%	8%	5%	8%	3%	8%	4%	7%
Total	**173**		**49**	**124**	**75**	**139**	**34**	**133**	**26**	**14**

TABLE A-13. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY HVAC IF INCENTIVE CREATES 1-YEAR PAYBACK PERIOD

HV7d/Q15d: How likely would your organization be to replace the failed equipment with a high efficiency HVAC system if the incentive creates a payback period of 1 year (100% ROI)?

[ASK IF HV7c < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	65	48%	49%	47%	46%	43%	71%	44%	57%	67%
Very likely	37	27%	31%	26%	28%	29%	17%	28%	30%	17%
Moderately likely	12	9%	5%	10%	14%	9%	8%	11%	4%	0%
Slightly likely	10	7%	8%	7%	5%	9%	0%	8%	4%	8%
Not at all likely	12	9%	8%	9%	7%	10%	4%	10%	4%	8%
Total	**136**		**39**	**97**	**57**	**112**	**24**	**101**	**23**	**12**

TABLE A-14. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY HVAC IF INCENTIVE CREATES 0-YEAR PAYBACK PERIOD

HV7e/Q15e: How likely would your organization be to replace the failed equipment with a high efficiency HVAC system if the incentive creates a payback period of 0 years (instant ROI)?

[ASK IF HV7d < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	27	38%	35%	39%	42%	41%	14%	35%	60%	25%
Very likely	18	25%	35%	22%	23%	23%	43%	28%	10%	25%
Moderately likely	11	15%	15%	16%	16%	14%	29%	14%	20%	25%
Slightly likely	6	8%	5%	10%	6%	9%	0%	11%	0%	0%
Not at all likely	9	13%	10%	14%	13%	13%	14%	12%	10%	25%
Total	**71**		**20**	**51**	**31**	**64**	**7**	**57**	**10**	**4**

TABLE A-15. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING MINOR HIGH-EFFICIENCY HVAC IMPROVEMENT IF INCENTIVE CREATES 10-YEAR PAYBACK PERIOD

HV9a/Q17a: Now, please consider your decision making for a minor investment to improve your HVAC efficiency. How likely would your organization be to install the HVAC system efficiency improvement if the incentive creates a payback period of 10 years (10% ROI)?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	39	16%	17%	16%	17%	13%	25%	15%	17%	24%
Very likely	38	16%	22%	13%	10%	17%	10%	16%	9%	19%
Moderately likely	77	31%	38%	28%	35%	31%	31%	33%	29%	19%
Slightly likely	51	21%	15%	23%	23%	22%	18%	20%	29%	19%
Not at all likely	40	16%	8%	20%	15%	16%	16%	16%	17%	19%
Total	**245**		**78**	**167**	**106**	**194**	**51**	**189**	**35**	**21**

TABLE A-16. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING MINOR HIGH-EFFICIENCY HVAC IMPROVEMENT IF INCENTIVE CREATES 5-YEAR PAYBACK PERIOD

HV9b/Q17b: How likely would your organization be to install the HVAC system efficiency improvement if the incentive creates a payback period of 5 years (20% ROI)?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
[ASK IF HV9a < Extremely Likely]										
Answer	Count	%								

Extremely likely	21	10%	11%	10%	9%	12%	3%	12%	7%	0%
Very likely	63	31%	35%	28%	34%	27%	47%	33%	14%	38%
Moderately likely	73	35%	38%	34%	38%	36%	32%	32%	55%	31%
Slightly likely	32	16%	9%	18%	15%	16%	13%	15%	17%	19%
Not at all likely	17	8%	6%	9%	5%	9%	5%	8%	7%	13%
Total	**206**		**65**	**141**	**88**	**168**	**38**	**161**	**29**	**16**

TABLE A-17. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING MINOR HIGH-EFFICIENCY HVAC IMPROVEMENT IF INCENTIVE CREATES 3-YEAR PAYBACK PERIOD

HV9c/Q17c: How likely would your organization be to install the HVAC system efficiency improvement if the incentive creates a payback period of 3 years (33% ROI)?										
[ASK IF HV9b < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	39	21%	21%	21%	25%	20%	27%	25%	4%	19%
Very likely	70	38%	45%	35%	38%	37%	41%	33%	63%	38%
Moderately likely	50	27%	24%	28%	29%	28%	24%	27%	26%	31%
Slightly likely	17	9%	7%	10%	5%	11%	3%	11%	4%	6%
Not at all likely	9	5%	3%	6%	4%	5%	5%	5%	4%	6%
Total	**185**		**58**	**127**	**80**	**148**	**37**	**142**	**27**	**16**

TABLE A-18. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING MINOR HIGH-EFFICIENCY HVAC IMPROVEMENT IF INCENTIVE CREATES 1-YEAR PAYBACK PERIOD

HV9d/Q17d: How likely would your organization be to install the HVAC system efficiency improvement if the incentive creates a payback period of 1 year (100% ROI)?										
[ASK IF HV9c < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	79	54%	59%	52%	50%	52%	63%	52%	69%	38%
Very likely	39	27%	30%	25%	32%	27%	26%	25%	23%	46%
Moderately likely	14	10%	4%	12%	10%	10%	7%	12%	4%	0%
Slightly likely	6	4%	2%	5%	3%	5%	0%	5%	0%	8%
Not at all likely	8	5%	4%	6%	5%	6%	4%	6%	4%	8%
Total	**146**		**46**	**100**	**60**	**119**	**27**	**107**	**26**	**13**

TABLE A-19. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING MINOR HIGH-EFFICIENCY HVAC IMPROVEMENT IF INCENTIVE CREATES 0-YEAR PAYBACK PERIOD

HV9e/Q17e: How likely would your organization be to install the HVAC system efficiency improvement if the incentive creates a payback period of 0 years (instant ROI)?										
[ASK IF HV9d < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	22	33%	26%	35%	43%	35%	20%	29%	50%	38%
Very likely	22	33%	37%	31%	33%	28%	60%	33%	38%	25%
Moderately likely	6	9%	5%	10%	10%	9%	10%	12%	0%	0%
Slightly likely	8	12%	21%	8%	3%	14%	0%	12%	0%	25%
Not at all likely	9	13%	11%	15%	10%	14%	10%	14%	13%	13%
Total	**67**		**19**	**48**	**30**	**57**	**10**	**51**	**8**	**8**

TABLE A-20. LIKELIHOOD OF CERTAIN BARRIERS PREVENTING SURVEY PARTICIPANTS FROM REPLACING BROKEN WATER HEATING EQUIPMENT WITH A HIGH-EFFICIENCY MODEL

WH1/Q19: How likely is it that the following factors will prevent your organization from replacing broken water heating equipment with a high-efficiency model as opposed to a standard-efficiency model?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Higher Cost:										
Extremely likely	47	20%	19%	20%	15%	21%	14%	19%	14%	33%
Very likely	56	23%	22%	24%	24%	25%	18%	26%	14%	14%
Moderately likely	65	27%	27%	27%	35%	27%	27%	26%	34%	24%
Slightly likely	43	18%	19%	17%	13%	15%	29%	17%	20%	19%
Not at all likely	28	12%	12%	12%	13%	12%	12%	11%	17%	10%
Total	**239**		**77**	**162**	**104**	**188**	**51**	**183**	**35**	**21**
Our ability to access financing or capital:										
Extremely likely	37	15%	18%	14%	13%	16%	12%	16%	9%	24%
Very likely	33	14%	13%	14%	14%	15%	8%	13%	9%	29%
Moderately likely	49	21%	16%	23%	23%	18%	29%	24%	9%	10%
Slightly likely	42	18%	19%	17%	13%	19%	12%	16%	23%	19%
Not at all likely	78	33%	34%	32%	37%	31%	39%	31%	51%	19%
Total	**239**		**77**	**162**	**104**	**188**	**51**	**183**	**35**	**21**
Uncertainty about the amount of savings:										
Extremely likely	23	10%	6%	11%	9%	9%	12%	9%	6%	19%
Very likely	50	21%	27%	18%	18%	22%	18%	21%	14%	33%
Moderately likely	77	32%	32%	32%	31%	32%	33%	35%	29%	14%
Slightly likely	45	19%	22%	17%	18%	20%	16%	16%	26%	29%
Not at all likely	43	18%	12%	21%	23%	17%	22%	18%	26%	5%
Total	**238**		**77**	**161**	**103**	**187**	**51**	**182**	**35**	**21**
No remaining upgrade opportunities:										
Extremely likely	27	11%	6%	14%	11%	11%	14%	10%	9%	24%
Very likely	27	11%	10%	12%	9%	12%	8%	12%	14%	5%

WH1/Q19: How likely is it that the following factors will prevent your organization from replacing broken water heating equipment with a high-efficiency model as opposed to a standard-efficiency model?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Moderately likely	42	18%	19%	17%	21%	18%	16%	20%	6%	19%
Slightly likely	50	21%	25%	19%	17%	22%	18%	21%	14%	33%
Not at all likely	92	39%	39%	39%	43%	37%	45%	37%	57%	19%
Total	**238**		**77**	**161**	**103**	**187**	**51**	**182**	**35**	**21**
Difficulty finding qualified contractors:										
Extremely likely	12	5%	6%	4%	5%	4%	8%	4%	3%	14%
Very likely	33	14%	10%	16%	14%	16%	8%	15%	11%	10%
Moderately likely	54	23%	22%	23%	23%	24%	18%	23%	14%	38%
Slightly likely	45	19%	21%	18%	15%	17%	25%	19%	23%	14%
Not at all likely	94	39%	40%	39%	44%	39%	41%	40%	49%	24%
Total	**238**		**77**	**161**	**103**	**187**	**51**	**182**	**35**	**21**
Limited financial benefit as a renter:										
Extremely likely	39	16%	14%	17%	11%	19%	6%	18%	6%	24%
Very likely	22	9%	9%	9%	9%	10%	6%	8%	11%	19%
Moderately likely	39	16%	14%	17%	15%	19%	8%	19%	3%	14%
Slightly likely	22	9%	13%	7%	6%	9%	10%	8%	9%	19%
Not at all likely	116	49%	49%	48%	60%	43%	71%	47%	71%	24%
Total	**238**		**77**	**161**	**103**	**187**	**51**	**182**	**35**	**21**
Potential negative impacts on aesthetics or comfort:										
Extremely likely	22	9%	5%	11%	12%	9%	10%	8%	11%	19%
Very likely	23	10%	10%	9%	10%	10%	10%	11%	3%	10%
Moderately likely	44	18%	21%	17%	16%	19%	18%	20%	9%	24%
Slightly likely	45	19%	27%	15%	13%	19%	20%	20%	20%	10%
Not at all likely	104	44%	36%	47%	50%	44%	43%	42%	57%	38%
Total	**238**		**77**	**161**	**103**	**187**	**51**	**182**	**35**	**21**

WH1/Q19: How likely is it that the following factors will prevent your organization from replacing broken water heating equipment with a high-efficiency model as opposed to a standard-efficiency model?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Limitations of building characteristics (e.g., no space to add equipment):										
Extremely likely	36	15%	16%	15%	12%	16%	14%	15%	9%	24%
Very likely	44	18%	17%	19%	16%	18%	20%	20%	11%	19%
Moderately likely	44	18%	18%	19%	21%	18%	20%	20%	11%	19%
Slightly likely	46	19%	17%	20%	19%	20%	18%	19%	23%	14%
Not at all likely	68	29%	32%	27%	32%	28%	29%	26%	46%	24%
Total	**238**		**77**	**161**	**103**	**187**	**51**	**182**	**35**	**21**
Lack of knowledge of energy efficient options:										
Extremely likely	15	6%	6%	6%	4%	6%	6%	6%	0%	19%
Very likely	22	9%	10%	9%	8%	11%	2%	8%	9%	19%
Moderately likely	51	21%	23%	20%	21%	22%	18%	25%	6%	19%
Slightly likely	58	24%	27%	23%	26%	23%	29%	25%	29%	14%
Not at all likely	92	39%	32%	42%	41%	37%	45%	36%	57%	29%
Total	**238**		**77**	**161**	**103**	**187**	**51**	**182**	**35**	**21**
Availability/lead-time to procure equipment:										
Extremely likely	21	9%	8%	9%	8%	7%	14%	9%	6%	14%
Very likely	41	17%	13%	19%	20%	14%	29%	16%	26%	14%
Moderately likely	65	27%	26%	28%	27%	29%	20%	28%	23%	29%
Slightly likely	51	21%	23%	20%	18%	21%	22%	22%	17%	24%
Not at all likely	60	25%	30%	23%	26%	28%	16%	25%	29%	19%
Total	**238**		**77**	**161**	**103**	**187**	**51**	**182**	**35**	**21**

TABLE A-21. LIKELIHOOD OF CERTAIN FACTORS MOTIVATING SURVEY PARTICIPANTS TO REPLACE BROKEN WATER HEATING EQUIPMENT WITH A HIGH-EFFICIENCY MODEL

WH4/Q22: How likely is it that the following factors would motivate you to replace your broken water heater with a high-efficiency model? Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Energy or utility bill savings:										
Extremely likely	113	47%	55%	44%	47%	48%	45%	51%	31%	45%
Very likely	70	29%	31%	29%	28%	30%	25%	27%	37%	35%
Moderately likely	34	14%	10%	16%	14%	12%	24%	13%	20%	15%
Slightly likely	9	4%	3%	4%	5%	3%	6%	3%	6%	5%
Not at all likely	12	5%	1%	7%	6%	6%	0%	5%	6%	0%
Total	**238**		**77**	**161**	**104**	**187**	**51**	**183**	**35**	**20**
Progress toward personal sustainability goals and/or "green" image:										
Extremely likely	29	12%	12%	13%	16%	12%	14%	12%	17%	5%
Very likely	41	17%	18%	17%	13%	17%	20%	19%	6%	25%
Moderately likely	70	30%	29%	30%	29%	30%	27%	27%	31%	55%
Slightly likely	37	16%	12%	18%	16%	13%	25%	16%	20%	5%
Not at all likely	59	25%	30%	23%	26%	28%	14%	27%	26%	10%
Total	**236**		**77**	**159**	**102**	**185**	**51**	**181**	**35**	**20**
Greater reliability over a standard efficiency system:										
Extremely likely	76	32%	31%	33%	29%	28%	47%	34%	20%	35%
Very likely	84	35%	39%	34%	35%	38%	27%	35%	34%	45%
Moderately likely	44	19%	21%	18%	18%	18%	20%	18%	23%	15%
Slightly likely	21	9%	8%	9%	12%	10%	6%	8%	17%	5%
Not at all likely	12	5%	1%	7%	6%	6%	0%	5%	6%	0%
Total	**237**		**77**	**160**	**103**	**186**	**51**	**182**	**35**	**20**
Improved water heater performance over a standard efficiency system:										
Extremely likely	61	26%	25%	26%	24%	22%	41%	27%	20%	30%
Very likely	82	35%	39%	33%	33%	37%	25%	35%	29%	45%

WH4/Q22: How likely is it that the following factors would motivate you to replace your broken water heater with a high-efficiency model?										
Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Moderately likely	60	25%	22%	27%	28%	24%	29%	24%	34%	25%
Slightly likely	13	6%	9%	4%	5%	6%	4%	5%	11%	0%
Not at all likely	20	8%	5%	10%	10%	11%	0%	10%	6%	0%
Total	**236**		**77**	**159**	**102**	**185**	**51**	**181**	**35**	**20**

TABLE A-22. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY WATER HEATER IF INCENTIVE CREATES 10-YEAR PAYBACK PERIOD

WH7a/Q25a: How likely would your organization be to replace the failed equipment with a high efficiency water heater if the incentive creates a payback period of 10 years (10% ROI)?										
Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Extremely likely	29	12%	12%	12%	11%	11%	18%	9%	14%	33%
Very likely	31	13%	17%	11%	15%	13%	12%	15%	3%	10%
Moderately likely	70	29%	36%	26%	28%	28%	33%	32%	26%	10%
Slightly likely	47	20%	17%	21%	20%	20%	18%	17%	26%	29%
Not at all likely	64	27%	19%	30%	26%	28%	20%	26%	31%	19%
Total	**241**		**78**	**163**	**104**	**190**	**51**	**185**	**35**	**21**

TABLE A-23. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY WATER HEATER IF INCENTIVE CREATES 5-YEAR PAYBACK PERIOD

WH7b/Q25b: How likely would your organization be to replace the failed

equipment with a high efficiency water heater if the incentive creates a payback period of 5 years (20% ROI)?										
[ASK IF WH7a < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	20	10%	12%	8%	9%	11%	5%	11%	3%	7%
Very likely	48	23%	31%	19%	23%	20%	33%	27%	10%	7%
Moderately likely	75	36%	31%	38%	41%	35%	38%	33%	47%	50%
Slightly likely	35	17%	13%	18%	15%	18%	12%	16%	20%	21%
Not at all likely	32	15%	13%	16%	13%	16%	12%	14%	20%	14%
Total	**210**		**68**	**142**	**93**	**168**	**42**	**166**	**30**	**14**

TABLE A-24. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY WATER HEATER IF INCENTIVE CREATES 3-YEAR PAYBACK PERIOD

WH7c/Q25c: How likely would your organization be to replace the failed equipment with a high efficiency water heater if the incentive creates a payback period of 3 years (33% ROI)?										
[ASK IF WH7b < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	36	19%	22%	18%	19%	17%	28%	22%	7%	8%
Very likely	69	36%	38%	35%	38%	37%	33%	34%	41%	46%
Moderately likely	44	23%	23%	23%	25%	22%	28%	22%	28%	23%
Slightly likely	20	11%	5%	13%	8%	12%	5%	10%	10%	15%
Not at all likely	21	11%	12%	11%	11%	12%	8%	11%	14%	8%
Total	**190**		**60**	**130**	**85**	**150**	**40**	**148**	**29**	**13**

TABLE A-25. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY WATER HEATER IF INCENTIVE CREATES 1-YEAR PAYBACK PERIOD

WH7d/Q25d: How likely would your organization be to replace the failed equipment with a high efficiency water heater if the incentive creates a payback period of 1 year (100% ROI)?										
[ASK IF WH7c < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	73	47%	53%	45%	39%	46%	52%	47%	48%	50%
Very likely	45	29%	28%	30%	35%	28%	34%	30%	22%	33%
Moderately likely	13	8%	11%	7%	13%	9%	7%	7%	19%	0%
Slightly likely	8	5%	2%	7%	3%	6%	3%	5%	4%	8%
Not at all likely	15	10%	6%	11%	10%	11%	3%	10%	7%	8%
Total	**154**		**47**	**107**	**69**	**125**	**29**	**115**	**27**	**12**

TABLE A-26. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY WATER HEATER IF INCENTIVE CREATES 0-YEAR PAYBACK PERIOD

WH7e/Q25e: How likely would your organization be to replace the failed equipment with a high efficiency water heater if the incentive creates a payback period of 0 years (instant ROI)?										
[ASK IF WH7d < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	39	48%	55%	46%	55%	49%	43%	44%	57%	67%
Very likely	17	21%	23%	20%	21%	19%	29%	23%	21%	0%
Moderately likely	4	5%	5%	5%	5%	4%	7%	7%	0%	0%

Slightly likely	7	9%	5%	10%	5%	7%	14%	8%	7%	17%
Not at all likely	14	17%	14%	19%	14%	19%	7%	18%	14%	17%
Total	**81**		**22**	**59**	**42**	**67**	**14**	**61**	**14**	**6**

TABLE A-27. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING A MINOR HIGH-EFFICIENCY WATER HEATER IMPROVEMENT IF INCENTIVE CREATES 10-YEAR PAYBACK PERIOD

WH9a/Q27a: Now, please consider your decision making for a minor investment to improve your water heater efficiency. Your utility offers an incentive to offset this cost. How likely would your organization be to purchase and install the water heating efficiency improvement if the incentive creates a payback period of 10 years (10% ROI)?

Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Extremely likely	34	14%	13%	15%	13%	13%	18%	13%	14%	29%
Very likely	25	10%	14%	9%	10%	11%	10%	13%	0%	10%
Moderately likely	61	26%	30%	23%	26%	24%	31%	26%	26%	19%
Slightly likely	57	24%	21%	25%	27%	23%	25%	21%	34%	29%
Not at all likely	62	26%	22%	28%	24%	29%	16%	27%	26%	14%

Total	**239**		**77**	**162**	**104**	**188**	**51**	**183**	**35**	**21**

TABLE A-28. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING A MINOR HIGH-EFFICIENCY WATER HEATER IMPROVEMENT IF INCENTIVE CREATES 5-YEAR PAYBACK PERIOD

WH9b/Q27b: How likely would your organization be to purchase and install the water heating efficiency improvement if the incentive creates a payback period of 5 years (20% ROI)?										
[ASK IF WH9a < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	18	9%	13%	7%	6%	9%	10%	11%	3%	0%
Very likely	46	22%	27%	20%	21%	21%	26%	24%	7%	33%
Moderately likely	70	34%	31%	36%	40%	33%	38%	33%	37%	40%
Slightly likely	45	22%	16%	25%	22%	22%	21%	19%	40%	13%
Not at all likely	26	13%	12%	13%	11%	15%	5%	13%	13%	13%
Total	**205**		**67**	**138**	**90**	**163**	**42**	**160**	**30**	**15**

TABLE A-29. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING A MINOR HIGH-EFFICIENCY WATER HEATER IMPROVEMENT IF INCENTIVE CREATES 3-YEAR PAYBACK PERIOD

WH9c/Q27c: How likely would your organization be to purchase and install the water heating efficiency improvement if the incentive creates a payback period of 3 years (33% ROI)?										
[ASK IF WH9b < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	37	20%	19%	20%	22%	19%	24%	22%	3%	27%
Very likely	67	36%	40%	34%	35%	36%	37%	36%	38%	27%
Moderately likely	43	23%	22%	23%	24%	21%	29%	21%	31%	27%
Slightly likely	21	11%	9%	12%	9%	12%	8%	10%	17%	13%

Not at all likely	19	10%	10%	10%	9%	12%	3%	10%	10%	7%
Total	**187**		**58**	**129**	**85**	**149**	**38**	**143**	**29**	**15**

TABLE A-30. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING A MINOR HIGH-EFFICIENCY WATER HEATER IMPROVEMENT IF INCENTIVE CREATES 1-YEAR PAYBACK PERIOD

WH9d/Q27d: How likely would your organization be to purchase and install the water heating efficiency improvement if the incentive creates a payback period of 1 years (100% ROI)?										
[ASK IF WH9c < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	67	45%	49%	43%	38%	43%	52%	48%	39%	27%
Very likely	46	31%	28%	32%	33%	30%	34%	29%	29%	55%
Moderately likely	16	11%	11%	11%	17%	11%	10%	8%	25%	0%
Slightly likely	6	4%	4%	4%	3%	5%	0%	5%	0%	9%
Not at all likely	15	10%	9%	11%	9%	12%	3%	11%	7%	9%
Total	**150**		**47**	**103**	**66**	**121**	**29**	**111**	**28**	**11**

TABLE A-31. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING A MINOR HIGH-EFFICIENCY WATER HEATER IMPROVEMENT IF INCENTIVE CREATES 0-YEAR PAYBACK PERIOD

WH9e/Q27e: How likely would your organization be to purchase and install the water heating efficiency improvement if the incentive creates a payback period of 0 years (instant ROI)? [ASK IF WH9d < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	34	41%	42%	41%	49%	43%	29%	36%	47%	63%
Very likely	24	29%	38%	25%	22%	25%	50%	33%	24%	13%
Moderately likely	7	8%	4%	10%	12%	7%	14%	7%	18%	0%
Slightly likely	3	4%	0%	5%	2%	4%	0%	3%	0%	13%
Not at all likely	15	18%	17%	19%	15%	20%	7%	21%	12%	13%
Total	**83**		**24**	**59**	**41**	**69**	**14**	**58**	**17**	**8**

TABLE A-32. LIKELIHOOD OF CERTAIN BARRIERS PREVENTING SURVEY PARTICIPANTS FROM REPLACING BROKEN REFRIGERATION EQUIPMENT WITH A HIGH-EFFICIENCY MODEL

RF1/Q29: How likely is it that the following factors will prevent your organization from replacing broken refrigeration equipment with a high-efficiency version as opposed to a standard-efficiency version?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Higher cost:										
Extremely likely	61	26%	24%	27%	28%	27%	22%	27%	21%	29%
Very likely	49	21%	20%	21%	17%	22%	16%	21%	21%	24%
Moderately likely	67	29%	29%	28%	31%	26%	39%	28%	32%	24%
Slightly likely	27	11%	13%	11%	10%	12%	10%	12%	9%	14%
Not at all likely	31	13%	13%	13%	15%	13%	12%	13%	18%	10%
Total	**235**		**75**	**160**	**101**	**186**	**49**	**180**	**34**	**21**
Our ability to access financing or capital:										
Extremely likely	39	17%	13%	18%	20%	17%	14%	17%	12%	24%
Very likely	38	16%	23%	13%	15%	17%	12%	17%	15%	14%
Moderately likely	41	18%	13%	19%	15%	16%	22%	17%	9%	38%

RF1/Q29: How likely is it that the following factors will prevent your organization from replacing broken refrigeration equipment with a high-efficiency version as opposed to a standard-efficiency version?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Slightly likely	33	14%	9%	16%	15%	14%	16%	15%	15%	5%
Not at all likely	83	35%	41%	33%	35%	36%	35%	35%	50%	19%
Total	**234**		**75**	**159**	**100**	**185**	**49**	**179**	**34**	**21**
Uncertainty about the amount of savings:										
Extremely likely	29	12%	12%	13%	13%	12%	12%	11%	12%	29%
Very likely	39	17%	12%	19%	16%	16%	18%	16%	15%	24%
Moderately likely	68	29%	35%	26%	26%	28%	33%	30%	21%	33%
Slightly likely	50	21%	28%	18%	18%	23%	16%	23%	21%	10%
Not at all likely	48	21%	13%	24%	27%	21%	20%	20%	32%	5%
Total	**234**		**75**	**159**	**100**	**185**	**49**	**179**	**34**	**21**
No remaining upgrade opportunities:										
Extremely likely	33	14%	11%	16%	17%	13%	18%	11%	21%	29%
Very likely	29	12%	15%	11%	10%	11%	16%	12%	12%	19%
Moderately likely	50	21%	28%	18%	17%	24%	12%	22%	9%	33%
Slightly likely	38	16%	12%	18%	20%	16%	16%	17%	15%	10%
Not at all likely	83	36%	35%	36%	35%	35%	37%	37%	44%	10%
Total	**233**		**75**	**158**	**99**	**184**	**49**	**178**	**34**	**21**
Difficulty finding qualified contractors:										
Extremely likely	18	8%	11%	6%	7%	8%	8%	7%	6%	14%
Very likely	29	12%	15%	11%	10%	13%	10%	12%	6%	24%
Moderately likely	34	15%	8%	18%	14%	14%	16%	15%	9%	19%
Slightly likely	50	21%	24%	20%	21%	21%	22%	19%	32%	24%
Not at all likely	102	44%	43%	44%	47%	44%	43%	46%	47%	19%
Total	**233**		**75**	**158**	**99**	**184**	**49**	**178**	**34**	**21**
Limited financial benefit as a renter:										
Extremely likely	36	15%	9%	18%	18%	17%	10%	15%	18%	14%

RF1/Q29: How likely is it that the following factors will prevent your organization from replacing broken refrigeration equipment with a high-efficiency version as opposed to a standard-efficiency version?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Very likely	26	11%	11%	11%	6%	13%	6%	11%	6%	24%
Moderately likely	38	16%	17%	16%	16%	19%	6%	16%	9%	33%
Slightly likely	20	9%	12%	7%	3%	9%	8%	8%	12%	5%
Not at all likely	113	48%	51%	47%	57%	43%	69%	50%	56%	24%
Total	**233**		**75**	**158**	**99**	**184**	**49**	**178**	**34**	**21**
Potential negative impacts on product quality or preservation:										
Extremely likely	29	12%	8%	15%	13%	12%	14%	13%	9%	14%
Very likely	37	16%	16%	16%	17%	16%	16%	13%	26%	19%
Moderately likely	53	23%	24%	22%	14%	20%	33%	25%	6%	29%
Slightly likely	34	15%	17%	13%	14%	13%	20%	15%	15%	14%
Not at all likely	80	34%	35%	34%	41%	39%	16%	34%	44%	24%
Total	**233**		**75**	**158**	**99**	**184**	**49**	**178**	**34**	**21**
Limitations of building characteristics (e.g., no space to add equipment):										
Extremely likely	31	13%	7%	16%	18%	13%	14%	12%	12%	24%
Very likely	50	21%	21%	22%	19%	21%	22%	21%	21%	24%
Moderately likely	42	18%	17%	18%	16%	19%	14%	20%	3%	24%
Slightly likely	32	14%	17%	12%	15%	13%	16%	13%	21%	5%
Not at all likely	78	33%	37%	32%	31%	34%	33%	33%	44%	24%
Total	**233**		**75**	**158**	**99**	**184**	**49**	**178**	**34**	**21**
Lack of knowledge of energy efficient options:										
Extremely likely	14	6%	4%	7%	8%	5%	8%	6%	6%	10%
Very likely	27	12%	13%	11%	8%	13%	6%	10%	12%	24%
Moderately likely	56	24%	20%	26%	21%	23%	27%	26%	15%	24%
Slightly likely	58	25%	33%	21%	21%	25%	24%	26%	18%	29%
Not at all likely	78	33%	29%	35%	41%	33%	35%	33%	50%	14%

RF1/Q29: How likely is it that the following factors will prevent your organization from replacing broken refrigeration equipment with a high-efficiency version as opposed to a standard-efficiency version?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Total	**233**		**75**	**158**	**99**	**184**	**49**	**178**	**34**	**21**
Availability/lead-time to procure equipment:										
Extremely likely	23	10%	1%	14%	8%	8%	16%	9%	12%	14%
Very likely	38	16%	20%	15%	12%	15%	22%	16%	12%	29%
Moderately likely	48	21%	20%	21%	23%	20%	22%	22%	15%	19%
Slightly likely	58	25%	24%	25%	26%	26%	22%	25%	29%	19%
Not at all likely	66	28%	35%	25%	30%	32%	16%	29%	32%	19%
Total	**233**		**75**	**158**	**99**	**184**	**49**	**178**	**34**	**21**

TABLE A-33. LIKELIHOOD OF CERTAIN FACTORS MOTIVATING SURVEY PARTICIPANTS TO REPLACE BROKEN REFRIGERATION EQUIPMENT WITH A HIGH-EFFICIENCY MODEL

RF4/Q32: How likely is it that the following factors would motivate you to replace your broken refrigeration equipment with a high-efficiency model?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Energy or utility bill savings:										
Extremely likely	5	18%	14%	19%	23%	17%	25%	13%	22%	33%
Very likely	7	25%	43%	19%	23%	25%	25%	31%	22%	0%
Moderately likely	2	7%	0%	10%	0%	8%	0%	6%	0%	33%
Slightly likely	1	4%	14%	0%	0%	4%	0%	6%	0%	0%
Not at all likely	13	46%	29%	52%	54%	46%	50%	44%	56%	33%
Total	**28**		**7**	**21**	**13**	**24**	**4**	**16**	**9**	**3**
Progress toward personal sustainability goals and/or "green" image:										
Extremely likely	2	7%	0%	10%	8%	8%	0%	6%	11%	0%
Very likely	3	11%	29%	5%	15%	8%	25%	13%	11%	0%

RF4/Q32: How likely is it that the following factors would motivate you to replace your broken refrigeration equipment with a high-efficiency model?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Moderately likely	5	18%	14%	19%	8%	21%	0%	19%	11%	33%
Slightly likely	5	18%	0%	24%	31%	17%	25%	13%	22%	33%
Not at all likely	13	46%	57%	43%	38%	46%	50%	50%	44%	33%
Total	**28**		**7**	**21**	**13**	**24**	**4**	**16**	**9**	**3**
Increased system reliability:										
Extremely likely	2	7%	14%	5%	8%	8%	0%	13%	0%	0%
Very likely	5	18%	29%	14%	23%	13%	50%	19%	22%	0%
Moderately likely	6	21%	14%	24%	15%	25%	0%	19%	22%	33%
Slightly likely	2	7%	0%	10%	8%	8%	0%	0%	11%	33%
Not at all likely	13	46%	43%	48%	46%	46%	50%	50%	44%	33%
Total	**28**		**7**	**21**	**13**	**24**	**4**	**16**	**9**	**3**
Improved operational safety:										
Extremely likely	1	4%	0%	5%	8%	0%	25%	0%	11%	0%
Very likely	3	11%	29%	5%	8%	13%	0%	13%	11%	0%
Moderately likely	7	25%	14%	29%	23%	25%	25%	31%	11%	33%
Slightly likely	5	18%	14%	19%	23%	21%	0%	13%	22%	33%
Not at all likely	12	43%	43%	43%	38%	42%	50%	44%	44%	33%
Total	**28**		**7**	**21**	**13**	**24**	**4**	**16**	**9**	**3**
Quieter operation:										
Extremely likely	1	4%	14%	0%	0%	4%	0%	6%	0%	0%
Very likely	1	4%	0%	5%	8%	4%	0%	6%	0%	0%
Moderately likely	5	18%	29%	14%	8%	21%	0%	25%	0%	33%
Slightly likely	4	14%	0%	19%	23%	17%	0%	6%	33%	0%
Not at all likely	17	61%	57%	62%	62%	54%	100%	56%	67%	67%
Total	**28**		**7**	**21**	**13**	**24**	**4**	**16**	**9**	**3**

RF4/Q32: How likely is it that the following factors would motivate you to replace your broken refrigeration equipment with a high-efficiency model?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Better temperature management (reduced food spoilage):										
Extremely likely	2	7%	14%	5%	8%	8%	0%	13%	0%	0%
Very likely	3	11%	29%	5%	8%	13%	0%	19%	0%	0%
Moderately likely	7	25%	14%	29%	15%	25%	25%	19%	22%	67%
Slightly likely	2	7%	0%	10%	15%	0%	50%	0%	22%	0%
Not at all likely	14	50%	43%	52%	54%	54%	25%	50%	56%	33%
Total	**28**		**7**	**21**	**13**	**24**	**4**	**16**	**9**	**3**

TABLE A-34. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY REFRIGERATOR IF INCENTIVE CREATES 10-YEAR PAYBACK PERIOD

RF7a/Q35a: First, please consider your decision making for a major investment. A high-efficiency water heater would cost 20% more. Your utility offers an incentive to offset this higher cost. How likely would your organization be to replace the failed equipment with a high efficiency refrigerator if the incentive creates a payback period of 10 years (10% ROI)?											
Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Extremely likely	24	10%	11%	10%	8%	10%	10%	9%	9%	19%
Very likely	22	9%	11%	9%	10%	9%	12%	10%	6%	10%
Moderately likely	53	23%	25%	21%	24%	22%	27%	23%	18%	24%
Slightly likely	53	23%	25%	21%	20%	22%	24%	23%	18%	29%
Not at all likely	83	35%	28%	39%	39%	38%	27%	34%	50%	19%
Total	**235**		**75**	**160**	**101**	**186**	**49**	**180**	**34**	**21**

TABLE A-35. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY REFRIGERATOR IF INCENTIVE CREATES 5-YEAR PAYBACK PERIOD

RF7b/Q35b: How likely would your organization be to replace the failed equipment with a high efficiency refrigerator if the incentive creates a payback period of 5 years (20% ROI)?										
[ASK IF RF7a < Extremely Likely]										
Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Extremely likely	16	8%	10%	6%	5%	8%	5%	9%	3%	0%
Very likely	40	19%	21%	18%	22%	16%	30%	20%	10%	29%
Moderately likely	66	31%	31%	31%	29%	31%	34%	31%	26%	41%
Slightly likely	40	19%	16%	20%	18%	20%	14%	19%	23%	12%
Not at all likely	49	23%	21%	24%	26%	25%	18%	21%	39%	18%
Total	**211**		**67**	**144**	**93**	**167**	**44**	**163**	**31**	**17**

TABLE A-36. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY REFRIGERATOR IF INCENTIVE CREATES 3-YEAR PAYBACK PERIOD

RF7c/Q35c: How likely would your organization be to replace the failed equipment with a high efficiency refrigerator if the incentive creates a payback period of 3 years (33% ROI)?										
[ASK IF RF7b < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	36	18%	17%	19%	22%	16%	26%	20%	10%	18%
Very likely	50	26%	28%	24%	24%	24%	31%	25%	23%	35%
Moderately likely	55	28%	30%	27%	25%	29%	26%	30%	23%	18%
Slightly likely	12	6%	5%	7%	6%	7%	2%	5%	7%	12%
Not at all likely	42	22%	20%	22%	24%	24%	14%	19%	37%	18%
Total	**195**		**60**	**135**	**88**	**153**	**42**	**148**	**30**	**17**

TABLE A-37. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY REFRIGERATOR IF INCENTIVE CREATES 1-YEAR PAYBACK PERIOD

RF7d/Q35d: How likely would your organization be to replace the failed equipment with a high efficiency refrigerator if the incentive creates a payback period of 1 year (100% ROI)?										
[ASK IF RF7c < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	59	37%	36%	38%	32%	35%	45%	40%	26%	36%
Very likely	43	27%	32%	25%	26%	26%	32%	27%	22%	36%
Moderately likely	21	13%	14%	13%	17%	15%	6%	14%	19%	0%

Slightly likely	7	4%	2%	6%	4%	5%	0%	3%	4%	14%
Not at all likely	29	18%	16%	19%	20%	19%	16%	16%	30%	14%
Total	**159**		**50**	**109**	**69**	**128**	**31**	**118**	**27**	**14**

TABLE A-38. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING HIGH-EFFICIENCY REFRIGERATOR IF INCENTIVE CREATES 0-YEAR PAYBACK PERIOD

RF7e/Q35e: How likely would your organization be to replace the failed equipment with a high efficiency refrigerator if the incentive creates a payback period of 0 years (instant ROI)?

[ASK IF RF7d < Extremely Likely]

Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Extremely likely	38	38%	41%	37%	43%	39%	35%	45%	25%	11%
Very likely	30	30%	28%	31%	23%	29%	35%	25%	35%	56%
Moderately likely	4	4%	3%	4%	6%	2%	12%	4%	5%	0%
Slightly likely	3	3%	3%	3%	2%	4%	0%	3%	0%	11%
Not at all likely	25	25%	25%	25%	26%	27%	18%	23%	35%	22%
Total	**100**		**32**	**68**	**47**	**83**	**17**	**71**	**20**	**9**

TABLE A-39. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING MINOR HIGH-EFFICIENCY REFRIGERATION EQUIPMENT IMPROVEMENT IF INCENTIVE CREATES 10-YEAR PAYBACK PERIOD

RF9a/Q37a: Now, please consider your decision making for a minor investment to improve your refrigeration efficiency. Your utility offers an incentive to offset the cost. How likely would your organization be to replace the failed equipment with a high efficiency refrigerator or refrigeration equipment under the following circumstances. The incentive creates a payback period of 10 years (10% ROI).

Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Extremely likely	24	10%	11%	10%	10%	10%	12%	10%	6%	19%

Very likely	23	10%	16%	7%	6%	10%	8%	11%	3%	14%
Moderately likely	55	23%	25%	23%	26%	22%	31%	23%	21%	29%
Slightly likely	55	23%	19%	26%	24%	23%	24%	23%	26%	19%
Not at all likely	78	33%	29%	35%	35%	35%	24%	33%	44%	19%
Total	**235**		**75**	**160**	**101**	**186**	**49**	**180**	**34**	**21**

TABLE A-40. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING MINOR HIGH-EFFICIENCY REFRIGERATION EQUIPMENT IMPROVEMENT IF INCENTIVE CREATES 5-YEAR PAYBACK PERIOD

RF9b/Q37b: How likely would your organization be to replace the failed equipment with a high efficiency refrigerator or refrigeration equipment if the incentive creates a payback period of 5 years (20% ROI)?										
[ASK IF RF9a < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Extremely likely	16	8%	10%	6%	5%	7%	9%	9%	6%	0%
Very likely	46	22%	28%	19%	20%	21%	26%	23%	9%	35%
Moderately likely	65	31%	30%	31%	31%	31%	30%	31%	28%	35%
Slightly likely	34	16%	10%	19%	18%	16%	16%	17%	19%	6%
Not at all likely	50	24%	21%	25%	26%	25%	19%	21%	38%	24%
Total	**211**		**67**	**144**	**91**	**168**	**43**	**162**	**32**	**17**

TABLE A-41. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING MINOR HIGH-EFFICIENCY REFRIGERATION EQUIPMENT IMPROVEMENT IF INCENTIVE CREATES 3-YEAR PAYBACK PERIOD

RF9c/Q37c: How likely would your organization be to replace the failed equipment with a high efficiency refrigerator or refrigeration equipment if the incentive creates a payback period of 3 years (33% ROI)?										
[ASK IF RF9b < Extremely Likely]			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								

Extremely likely	34	17%	17%	18%	20%	17%	18%	19%	7%	24%
Very likely	63	32%	42%	28%	26%	31%	36%	32%	30%	41%
Moderately likely	44	23%	18%	24%	24%	22%	23%	24%	23%	6%
Slightly likely	13	7%	5%	7%	8%	6%	8%	7%	7%	6%
Not at all likely	41	21%	18%	22%	22%	22%	15%	18%	33%	24%
Total	**195**		**60**	**135**	**86**	**156**	**39**	**148**	**30**	**17**

TABLE A-42. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING MINOR HIGH-EFFICIENCY REFRIGERATION EQUIPMENT IMPROVEMENT IF INCENTIVE CREATES 1-YEAR PAYBACK PERIOD

RF9d/Q37d: How likely would your organization be to replace the failed equipment with a high efficiency refrigerator or refrigeration equipment if the incentive creates a payback period of 1 year (100% ROI)?

[ASK IF RF9c < Extremely Likely]

Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Extremely likely	67	42%	42%	41%	35%	40%	50%	46%	29%	31%
Very likely	36	22%	26%	21%	23%	22%	22%	22%	25%	23%
Moderately likely	21	13%	10%	14%	17%	13%	13%	12%	14%	23%
Slightly likely	7	4%	6%	4%	1%	5%	3%	5%	0%	8%
Not at all likely	30	19%	16%	20%	23%	20%	13%	16%	32%	15%
Total	**161**		**50**	**111**	**69**	**129**	**32**	**120**	**28**	**13**

TABLE A-43. LIKELIHOOD OF SURVEY PARTICIPANTS PURCHASING MINOR HIGH-EFFICIENCY REFRIGERATION EQUIPMENT IMPROVEMENT IF INCENTIVE CREATES 0-YEAR PAYBACK PERIOD

RF9e/Q37e: How likely would your organization be to replace the failed equipment with a high efficiency refrigerator or refrigeration equipment if the incentive creates a payback period of 0 years (instant ROI)?

[ASK IF RF9d < Extremely Likely]

Answer	Count	%	Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Extremely likely	33	35%	31%	37%	40%	36%	31%	38%	30%	22%
Very likely	24	26%	31%	23%	18%	24%	31%	28%	15%	33%
Moderately likely	7	7%	10%	6%	9%	5%	19%	8%	10%	0%

Slightly likely	4	4%	3%	5%	2%	4%	6%	2%	5%	22%
Not at all likely	26	28%	24%	29%	31%	31%	13%	25%	40%	22%
Total	**94**		**29**	**65**	**45**	**78**	**16**	**65**	**20**	**9**

TABLE A-44. AWARENESS OF TYPES OF LIGHTING CONTROLS

LC1/Q39: Prior to this survey, were you familiar with these different types of lighting controls?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	**Count**	**%**								
Basic Controls:										
Yes	211	91%	92%	90%	90%	89%	96%	91%	88%	95%
No	15	6%	8%	6%	5%	8%	2%	6%	12%	5%
Don't know	7	3%	0%	4%	5%	3%	2%	4%	0%	0%
Total	**233**		**74**	**159**	**101**	**184**	**49**	**179**	**34**	**20**
Stand-alone Sensor Controls:										
Yes	191	82%	83%	81%	84%	79%	90%	79%	91%	85%
No	32	14%	15%	13%	11%	15%	8%	14%	9%	15%
Don't know	11	5%	3%	6%	5%	5%	2%	6%	0%	0%
Total	**234**		**75**	**159**	**101**	**185**	**49**	**180**	**34**	**20**
Luminaire-level Lighting Controls (LLLC):										
Yes	107	46%	41%	48%	50%	41%	63%	42%	65%	45%
No	106	45%	53%	42%	40%	50%	27%	47%	35%	50%
Don't know	21	9%	5%	11%	10%	9%	10%	11%	0%	5%
Total	**234**		**75**	**159**	**101**	**185**	**49**	**180**	**34**	**20**
Networked Lighting Controls (NLC):										
Yes	100	43%	41%	44%	50%	39%	59%	41%	62%	30%
No	109	47%	50%	45%	40%	52%	29%	47%	35%	60%
Don't know	24	10%	9%	11%	11%	10%	12%	12%	3%	10%

Total	**233**		**74**	**159**	**101**	**184**	**49**	**179**	**34**	**20**

TABLE A-45. TYPES OF LIGHTING CONTROLS ALREADY INSTALLED AT FACILITIES

LC2/Q40: What kinds of lighting controls do you have installed at your facility?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	**Count**	**%**								
Basic Controls:										
Yes	214	92%	95%	91%	92%	90%	98%	91%	94%	95%
No	7	3%	4%	3%	2%	4%	0%	3%	6%	0%
Don't know	12	5%	1%	7%	6%	6%	2%	6%	0%	5%
Total	**233**		**75**	**158**	**100**	**184**	**49**	**179**	**34**	**20**
Stand-alone Sensor Controls:										
Yes	97	42%	35%	45%	48%	36%	65%	41%	41%	50%
No	123	53%	64%	48%	45%	58%	33%	53%	59%	45%
Don't know	12	5%	1%	7%	6%	6%	2%	6%	0%	5%
Total	**232**		**75**	**157**	**99**	**183**	**49**	**178**	**34**	**20**
Luminaire-level Lighting Controls (LLLC):										
Yes	18	8%	9%	7%	11%	5%	18%	7%	9%	10%
No	193	83%	87%	82%	77%	85%	76%	83%	82%	85%
Don't know	21	9%	4%	11%	12%	10%	6%	10%	9%	5%
Total	**232**		**75**	**157**	**99**	**183**	**49**	**178**	**34**	**20**
Networked Lighting Controls (NLC):										
Yes	17	7%	7%	8%	12%	4%	20%	8%	6%	0%
No	193	83%	89%	80%	77%	86%	73%	82%	85%	90%
Don't know	22	9%	4%	12%	11%	10%	6%	10%	9%	10%
Total	**232**		**75**	**157**	**99**	**183**	**49**	**178**	**34**	**20**

TABLE A-46. LIKELIHOOD OF CERTAIN BARRIERS PREVENTING SURVEY PARTICIPANTS FROM INSTALLING ADVANCED LIGHTING CONTROLS

LC3/Q41: How likely is it that the following factors will prevent your organization from installing these advanced lighting controls?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Cost to install:										
Extremely likely	86	38%	39%	37%	45%	37%	40%	39%	26%	40%
Very likely	48	21%	18%	22%	21%	23%	13%	19%	32%	20%
Moderately likely	44	19%	22%	18%	14%	19%	19%	19%	15%	30%
Slightly likely	26	11%	10%	12%	8%	9%	19%	13%	9%	5%
Not at all likely	25	11%	11%	11%	11%	11%	10%	10%	18%	5%
Total	**229**		**72**	**157**	**99**	**181**	**48**	**175**	**34**	**20**
Our ability to access financing or capital:										
Extremely likely	43	19%	20%	19%	23%	20%	17%	20%	9%	25%
Very likely	37	16%	13%	18%	20%	18%	10%	17%	15%	10%
Moderately likely	48	21%	25%	19%	14%	19%	29%	21%	12%	40%
Slightly likely	34	15%	14%	15%	15%	16%	13%	16%	15%	5%
Not at all likely	65	29%	28%	29%	28%	28%	31%	26%	48%	20%
Total	**227**		**71**	**156**	**97**	**179**	**48**	**174**	**33**	**20**
Uncertainty about the amount of savings:										
Extremely likely	29	13%	13%	13%	14%	14%	8%	11%	15%	20%
Very likely	50	22%	22%	22%	20%	24%	13%	18%	24%	50%
Moderately likely	59	26%	25%	26%	28%	26%	27%	28%	21%	20%
Slightly likely	44	19%	19%	19%	19%	16%	31%	22%	18%	0%
Not at all likely	46	20%	21%	20%	18%	20%	21%	21%	24%	10%
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**
We already have advanced lighting controls installed:										
Extremely likely	20	9%	10%	8%	13%	8%	13%	9%	9%	5%

LC3/Q41: How likely is it that the following factors will prevent your organization from installing these advanced lighting controls?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Very likely	13	6%	4%	6%	6%	7%	2%	5%	0%	20%
Moderately likely	27	12%	11%	12%	11%	11%	17%	13%	12%	5%
Slightly likely	19	8%	8%	8%	6%	8%	10%	8%	9%	15%
Not at all likely	148	65%	66%	65%	63%	67%	58%	65%	71%	55%
Total	**227**		**71**	**156**	**98**	**179**	**48**	**173**	**34**	**20**
Difficulty finding qualified contractors:										
Extremely likely	21	9%	10%	9%	8%	10%	6%	6%	9%	35%
Very likely	20	9%	8%	9%	4%	9%	6%	9%	6%	15%
Moderately likely	55	24%	24%	24%	26%	26%	17%	27%	15%	15%
Slightly likely	43	19%	14%	21%	25%	16%	29%	19%	24%	10%
Not at all likely	88	39%	44%	37%	37%	38%	42%	39%	45%	25%
Total	**227**		**71**	**156**	**97**	**179**	**48**	**174**	**33**	**20**
Limited financial benefit as a renter:										
Extremely likely	41	18%	14%	20%	22%	20%	10%	19%	15%	15%
Very likely	29	13%	13%	13%	4%	16%	2%	13%	3%	30%
Moderately likely	33	15%	20%	12%	11%	15%	15%	14%	12%	25%
Slightly likely	21	9%	11%	8%	6%	11%	4%	9%	9%	10%
Not at all likely	103	45%	42%	47%	57%	39%	69%	45%	61%	20%
Total	**227**		**71**	**156**	**97**	**179**	**48**	**174**	**33**	**20**
Potential negative impacts on aesthetics or comfort:										
Extremely likely	21	9%	6%	11%	11%	8%	15%	9%	12%	10%
Very likely	20	9%	4%	11%	9%	10%	4%	10%	0%	15%
Moderately likely	43	19%	21%	18%	16%	18%	23%	19%	21%	15%
Slightly likely	43	19%	21%	18%	16%	18%	23%	20%	9%	30%
Not at all likely	100	44%	48%	42%	46%	46%	35%	43%	58%	30%
Total	**227**		**71**	**156**	**97**	**179**	**48**	**174**	**33**	**20**

LC3/Q41: How likely is it that the following factors will prevent your organization from installing these advanced lighting controls?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Potential negative impacts on worker productivity:										
Extremely likely	29	13%	10%	14%	15%	14%	8%	11%	15%	20%
Very likely	24	11%	10%	11%	9%	13%	2%	9%	12%	25%
Moderately likely	39	17%	18%	17%	15%	17%	17%	20%	9%	5%
Slightly likely	36	16%	14%	17%	19%	15%	21%	18%	12%	5%
Not at all likely	99	44%	48%	42%	41%	41%	52%	42%	52%	45%
Total	**227**		**71**	**156**	**97**	**179**	**48**	**174**	**33**	**20**
Lack of knowledge about advanced lighting controls:										
Extremely likely	19	8%	11%	7%	7%	9%	6%	9%	6%	10%
Very likely	34	15%	14%	16%	12%	17%	6%	14%	12%	25%
Moderately likely	61	27%	31%	25%	24%	26%	30%	28%	15%	35%
Slightly likely	39	17%	14%	19%	20%	16%	21%	16%	24%	15%
Not at all likely	73	32%	31%	33%	37%	31%	36%	32%	42%	15%
Total	**226**		**72**	**154**	**97**	**179**	**47**	**173**	**33**	**20**
Availability/lead-time to procure equipment:										
Extremely likely	15	7%	4%	8%	8%	5%	13%	7%	6%	5%
Very likely	19	8%	8%	8%	5%	10%	2%	7%	6%	20%
Moderately likely	48	21%	17%	23%	21%	22%	17%	24%	9%	20%
Slightly likely	61	27%	29%	26%	23%	24%	35%	25%	35%	30%
Not at all likely	85	37%	42%	35%	42%	38%	33%	37%	44%	25%
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**
We do not use many or any LED lamps:										
Extremely likely	17	7%	10%	6%	7%	8%	6%	9%	3%	5%
Very likely	11	5%	4%	5%	4%	6%	2%	5%	0%	10%
Moderately likely	23	10%	7%	12%	10%	11%	6%	8%	18%	15%
Slightly likely	24	11%	13%	10%	10%	12%	6%	10%	6%	25%

LC3/Q41: How likely is it that the following factors will prevent your organization from installing these advanced lighting controls?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Not at all likely	152	67%	66%	67%	68%	64%	79%	68%	73%	45%
Total	**227**		**71**	**156**	**97**	**179**	**48**	**174**	**33**	**20**
Installation causing worker downtime:										
Extremely likely	28	12%	8%	14%	13%	12%	15%	10%	18%	25%
Very likely	21	9%	8%	10%	11%	11%	4%	9%	9%	10%
Moderately likely	42	18%	17%	19%	15%	18%	21%	20%	15%	15%
Slightly likely	46	20%	24%	19%	19%	21%	19%	22%	21%	5%
Not at all likely	91	40%	43%	38%	41%	39%	42%	40%	38%	45%
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**
We previously considered advanced lighting controls but chose to not have them installed:										
Extremely likely	11	5%	3%	6%	8%	5%	4%	5%	3%	5%
Very likely	10	4%	3%	5%	3%	5%	2%	5%	0%	10%
Moderately likely	28	12%	14%	12%	10%	11%	17%	12%	12%	20%
Slightly likely	29	13%	16%	12%	8%	13%	10%	12%	21%	10%
Not at all likely	148	65%	64%	66%	70%	65%	67%	67%	64%	55%
Total	**226**		**70**	**156**	**97**	**178**	**48**	**173**	**33**	**20**
Lack of time or other priorities:										
Extremely likely	34	15%	13%	16%	16%	15%	17%	14%	15%	25%
Very likely	50	22%	15%	25%	30%	23%	17%	21%	30%	20%
Moderately likely	57	25%	31%	22%	19%	25%	27%	28%	12%	25%
Slightly likely	34	15%	20%	13%	9%	13%	21%	15%	15%	15%
Not at all likely	52	23%	21%	24%	26%	24%	19%	23%	27%	15%
Total	**227**		**71**	**156**	**98**	**179**	**48**	**174**	**33**	**20**

TABLE A-47. LIKELIHOOD OF CERTAIN FACTORS MOTIVATING SURVEY PARTICIPANTS TO INSTALL ADVANCED LIGHTING CONTROLS

LC6/Q44: How likely is it that the following factors would motivate you to have advanced lighting controls installed in your facility?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Energy or Utility Bill Savings:										
Extremely likely	105	46%	53%	43%	41%	46%	44%	50%	24%	50%
Very likely	60	26%	24%	27%	27%	27%	25%	23%	38%	35%
Moderately likely	36	16%	11%	18%	19%	14%	23%	17%	15%	10%
Slightly likely	10	4%	6%	4%	3%	4%	6%	3%	9%	5%
Not at all likely	18	8%	7%	8%	9%	9%	2%	7%	15%	0%
Total	**229**		**72**	**157**	**99**	**181**	**48**	**175**	**34**	**20**
Progress Toward Sustainability Goals:										
Extremely likely	34	15%	17%	14%	16%	15%	15%	15%	12%	20%
Very likely	37	16%	18%	15%	13%	16%	19%	16%	12%	30%
Moderately likely	51	22%	21%	23%	26%	22%	25%	25%	18%	10%
Slightly likely	35	15%	8%	19%	16%	14%	21%	13%	26%	15%
Not at all likely	71	31%	36%	29%	29%	34%	21%	32%	32%	25%
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**
Progress Toward Sustainability Goals and/or "green" image:										
Extremely likely	27	12%	14%	11%	12%	12%	13%	13%	12%	5%
Very likely	31	14%	18%	12%	13%	13%	17%	14%	9%	15%
Moderately likely	57	25%	18%	28%	29%	25%	25%	25%	21%	35%
Slightly likely	45	20%	11%	24%	20%	18%	25%	17%	26%	30%
Not at all likely	68	30%	39%	26%	26%	32%	21%	31%	32%	15%
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**
Improved lighting quality/brightness:										
Extremely likely	54	24%	24%	24%	27%	24%	23%	24%	24%	20%
Very likely	66	29%	36%	26%	23%	29%	27%	30%	24%	30%
Moderately likely	54	24%	21%	25%	27%	25%	19%	24%	24%	25%
Slightly likely	28	12%	11%	13%	12%	8%	29%	13%	15%	5%

LC6/Q44: How likely is it that the following factors would motivate you to have advanced lighting controls installed in your facility?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Not at all likely	26	11%	8%	13%	11%	14%	2%	10%	15%	20%
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**
Longer bulb/fixture lifetime:										
Extremely likely	76	33%	29%	35%	37%	33%	35%	33%	32%	40%
Very likely	66	29%	28%	29%	23%	29%	29%	31%	21%	25%
Moderately likely	42	18%	28%	14%	15%	19%	17%	18%	18%	25%
Slightly likely	17	7%	4%	9%	11%	6%	13%	7%	12%	5%
Not at all likely	27	12%	11%	12%	13%	13%	6%	11%	18%	5%
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**
Improvements in worker productivity:										
Extremely likely	40	18%	18%	17%	17%	18%	15%	17%	18%	20%
Very likely	49	21%	21%	22%	16%	20%	27%	20%	24%	30%
Moderately likely	51	22%	25%	21%	27%	22%	23%	22%	26%	15%
Slightly likely	34	15%	15%	15%	16%	13%	21%	18%	9%	0%
Not at all likely	54	24%	21%	25%	23%	26%	15%	22%	24%	35%
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**
Planning to replace existing lights with LEDs:										
Extremely likely	54	24%	21%	25%	27%	22%	31%	23%	24%	30%
Very likely	43	19%	19%	19%	22%	19%	19%	20%	21%	10%
Moderately likely	45	20%	19%	20%	14%	21%	17%	17%	18%	45%
Slightly likely	24	11%	13%	10%	8%	11%	10%	11%	9%	5%
Not at all likely	62	27%	28%	27%	29%	28%	23%	29%	29%	10%
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**
Financial incentives from your electric utility:										
Extremely likely	88	39%	44%	36%	41%	38%	42%	41%	32%	30%
Very likely	67	29%	32%	28%	29%	30%	27%	30%	21%	35%

LC6/Q44: How likely is it that the following factors would motivate you to have advanced lighting controls installed in your facility?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Moderately likely	43	19%	14%	21%	18%	18%	21%	17%	21%	30%
Slightly likely	13	6%	3%	7%	6%	4%	10%	4%	15%	5%
Not at all likely	17	7%	7%	8%	6%	9%	0%	7%	12%	0%
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**
The ability to manage lighting schedules remotely:										
Extremely likely	37	16%	14%	17%	15%	12%	31%	18%	6%	15%
Very likely	37	16%	15%	17%	16%	16%	19%	18%	3%	25%
Moderately likely	44	19%	18%	20%	22%	22%	10%	18%	24%	20%
Slightly likely	46	20%	26%	17%	19%	19%	23%	18%	32%	15%
Not at all likely	64	28%	26%	29%	27%	31%	17%	27%	35%	25%
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**
Automatically sensing when spaces are unoccupied:										
Extremely likely	38	17%	19%	15%	14%	14%	25%	18%	9%	20%
Very likely	61	27%	25%	28%	30%	27%	25%	25%	24%	45%
Moderately likely	52	23%	21%	24%	22%	22%	27%	24%	24%	15%
Slightly likely	33	14%	17%	13%	16%	13%	19%	16%	12%	5%
Not at all likely	44	19%	18%	20%	17%	23%	4%	17%	32%	15%
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**
Turn-key services from a contractor manage all aspects of the installation, including permitting, incentives, and other paperwork:										
Extremely likely	52	23%	24%	22%	19%	22%	27%	24%	12%	35%
Very likely	51	22%	24%	22%	22%	22%	23%	25%	12%	15%
Moderately likely	58	25%	29%	24%	23%	24%	31%	22%	38%	35%
Slightly likely	26	11%	7%	13%	16%	11%	15%	11%	18%	5%
Not at all likely	41	18%	17%	19%	18%	22%	4%	18%	21%	10%

LC6/Q44: How likely is it that the following factors would motivate you to have advanced lighting controls installed in your facility?			Ameren	ComEd	Nicor Gas	Small Usage	Large Usage	Com.	Ind.	MF
Answer	Count	%								
Total	**228**		**72**	**156**	**98**	**180**	**48**	**174**	**34**	**20**

PREPARED BY GDS ASSOCIATES, INC.

2023-2024 Illinois Baseline Study

Ameren Illinois, Commonwealth Edison, and Nicor Gas

Nonresidential Baseline Study Results

FINAL
October 31,2024

GDS Associates, Inc.
ENGINEERS & CONSULTANTS

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