

*Tracking Study: Awareness of  
ENERGY STAR/ EnerGuide  
Symbols 2006*

**Final Report**

*Submitted to:*

**Natural Resources Canada**

**September 2006**

Contract# **23483-061825/001/CY**



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## INTRODUCTION AND BACKGROUND

Natural Resources Canada (NRCan) is the federal government department specializing in the sustainable development and use of natural resources specifically: energy, minerals and metals, forests and earth sciences.

In November 2001, the Office of Energy Efficiency at Natural Resources Canada approached Ipsos-Reid to conduct a survey to establish a benchmark of pre-launch awareness of ENERGY STAR, an international high-efficiency initiative that the department was introducing in Canada, as well as to track awareness of EnerGuide, an existing Natural Resources program.

As part of its ongoing commitment to monitor program effectiveness, NRCan conducts regular surveys to take the pulse of the Canadian public and track changes in awareness of the two programs, thereby gauging the effectiveness of the initiative and of the supporting promotional campaigns conducted by the department and various participants in the initiative.

This research represents the sixth wave of testing conducted since November 2001. Earlier research was also conducted in May 2005, November 2004, September 2003 and January 2003.

This wave of the study has been conducted to support NRCan's on-going evaluation of the ENERGY STAR and EnerGuide programs. Results through three previous waves of tracking surveys from 2001-2004 have shown marked increase in awareness among the Canadian population.

The present survey gathered information on Canadians' awareness and understanding of and reaction to the ENERGY STAR symbol and the EnerGuide program.

The ENERGY STAR symbol in Canada is designed to clearly identify the "best of class" energy-efficient consumer products in many areas including: residential heating and cooling equipment, major appliances, office equipment, lighting, consumer electronics, and windows and doors, as well as some industrial products.

EnerGuide provides information Canadian consumers need to be able to choose products that reduce energy use, which in turn will reduce green house gas emissions,

thereby protecting the environment. ENERGY STAR and EnerGuide are designed to stimulate demand of energy-efficient products in the marketplace. They focus on promotions that will result in favourable movement of market share toward energy-efficient products in Canada.

## METHODOLOGY

### Telephone Methodology

Ipsos-Reid conducted a 10-minute telephone interview among N=2,202 Canadian adults 18 years of age and over, across all regions of the country including the North. The margin of error for a sample this size is  $\pm 2.2$ , at a 95% confidence level. The survey was conducted between August 10-20, 2006.

The following chart indicates the regional distribution of the sample and associated margins of errors for each region:

Region	Sample Size	Margin of Error
Atlantic Provinces	154	7.9
Quebec	494	4.4
Ontario	758	3.6
Saskatchewan/Manitoba	136	8.4
Alberta	194	7.0
British Columbia	265	6.0
The North (including the Yukon, Northwest Territories and Nunavut)	201	6.9
<b>Canada</b>	<b>2,202</b>	<b>2.1</b>

Survey data has been weighted by region, age and gender to ensure results that are representative of the Canadian population.

### Online Methodology

In addition to the telephone survey, two questions were added to the Ipsos Reid Online Express, a weekly survey of Canadians conducted online. This research was conducted among 1,189 Canadians between August 29 and August 31, 2005.

The questions asked respondents whether they are aware of ENERGY STAR on both an unaided and aided basis. The aided awareness was tested by presenting an image of the current ENERGY STAR logo (unlike the telephone survey, which tests aided awareness through the use of a verbal description).

Survey respondents were selected at random from Ipsos Reid's Online Internet Household panel, a screened panel of some 80,000 Canadians online.

The margin of error for a sample of 1,124 is  $\pm 2.8$  percentage points, 19 times out of 20.

## SUMMARY OF KEY FINDINGS

Unaided awareness of ENERGY STAR continues to grow, as has been the case since the initial research in November 2001. Aided awareness of the ENERGY STAR symbol, a new symbol different from the one originally tested in 2001, has also grown significantly over the past year (particularly as tested by telephone).

As in earlier years, a wide majority of respondents who are aware of the ENERGY STAR symbol understand the symbol to mean energy efficiency, lower energy consumption and energy savings.

Taken together, the findings confirm that the awareness and understanding generated by the ENERGY STAR symbol have not diminished with the change to a new symbol.

In addition to establishing levels of awareness and understanding of the ENERGY STAR symbol among the public, this research also seeks to understand more about how consumers relate to the ENERGY STAR symbol.

During this report, we have found that the environment and a sense of social responsibility are key considerations for respondents who are aware of ENERGY STAR. At the same time, majorities of respondents reject the notions that buying ENERGY STAR-labelled products make them feel that they are spending money for nothing, that ENERGY STAR products do not meet their needs or that all products use energy just as efficiently, regardless of whether they carry the ENERGY STAR label.

However, while the environment is clearly a consideration, when respondents are asked which factor would motivate them to buy an ENERGY STAR-labelled product, financial considerations are chosen over the environment by a ratio of three to two.

Elsewhere, respondents were asked whether they would buy an ENERGY STAR-labelled product even if it cost 5%, 10% or 15% more than a similar product without the label. Not surprisingly the results register a decline in the proportion who would prefer ENERGY STAR-labelled products (with no price premium mentioned) to those who would still prefer and ENERGY STAR-labelled product if it cost 15% more than a similar product.

Analysing the data finds that those who are aware of financial incentives associated with ENERGY STAR-labelled products are much more “loyal” to ENERGY STAR-labelled products. That is, those aware of financial incentives are both significantly more likely than average to prefer ENERGY STAR-labelled products in general, and more likely to say they would pay more for an ENERGY STAR labelled product.

Those who have purchased ENERGY STAR products in the past and those who are concerned about the environment are also more likely to prefer ENERGY STAR-labelled products in general, and are somewhat more likely to prefer ENERGY STAR-labelled products if they are more expensive. However, they are not as likely to prefer ENERGY STAR-labelled products as those aware of financial incentives.

Respondents were also asked whether or not they had purchased or shopped for products from any several categories over the past year. The results show that respondents most often purchased home appliances and lighting products over the past year, followed by home office products, home electronics, building materials and heating and cooling equipment.

All respondents who bought products in one of these categories over the past year are more likely than average to say they are aware of ENERGY STAR on either an unaided or an aided basis. Among the different categories, those who bought a home appliance or lighting product are more likely than those who bought products in other categories to say they are aware of ENERGY STAR. Those who purchased home electronics, while more likely than average to claim awareness of ENERGY STAR, are less likely to do so than those who bought products in other categories.

## SOMMAIRE DES PRINCIPAUX RESULTATS

La connaissance spontanée du symbole ENERGY STAR continue de croître, comme c'est le cas depuis l'étude initiale menée en novembre 2001. La connaissance avec aide du symbole ENERGY STAR, qui est nouveau et différent de celui qui a fait l'objet de l'étude de 2001, s'est aussi accrue de façon significative au cours de la dernière année (en particulier en entrevue téléphonique).

Comme par les années passées, la vaste majorité des répondants qui connaissent le symbole ENERGY STAR comprennent qu'il représente l'efficacité énergétique, la faible consommation d'énergie et l'économie d'énergie.

Réunis, les résultats confirment que le changement de symbole n'a pas entraîné de diminution de la connaissance et de la compréhension du symbole ENERGY STAR.

En outre, afin d'établir les niveaux de connaissance et de compréhension du symbole ENERGY STAR par le grand public, on a aussi cherché à en savoir davantage, dans l'étude de cette année, sur la façon dont les consommateurs s'identifient au symbole ENERGY STAR.

Ainsi, l'étude révèle que l'environnement et un sentiment de responsabilité sociale sont des considérations importantes pour les répondants qui connaissent le symbole ENERGY STAR. Parallèlement, la majorité des répondants rejettent l'idée que le fait d'acheter des produits portant l'étiquette ENERGY STAR leur donne l'impression de dépenser de l'argent inutilement, que les produits identifiés ENERGY STAR ne répondent pas à leurs besoins ou que tous les produits sont aussi efficaces sur le plan énergétique, qu'ils portent ou non l'étiquette ENERGY STAR.

Toutefois, même si l'environnement est une considération importante, lorsqu'on demande aux répondants quel facteur les inciterait à acheter un produit portant l'étiquette ENERGY STAR, les considérations financières l'emportent sur l'environnement dans une proportion de trois pour deux.

On a aussi demandé aux répondants s'ils achèteraient un produit portant l'étiquette ENERGY STAR même s'il coûtait 5 %, 10 % ou 15 % de plus qu'un produit semblable sans étiquette. Comme on pouvait s'y attendre, les résultats révèlent une baisse de la proportion de répondants qui préféreraient des produits portant l'étiquette ENERGY

STAR (sans qu'un prix soit mentionné), par rapport à ceux qui préféreraient un produit portant l'étiquette ENERGY STAR même s'il coûtait 15 % de plus qu'un autre.

Une analyse des données révèle que les répondants qui connaissent les incitatifs financiers associés aux produits portant l'étiquette ENERGY STAR sont beaucoup plus « fidèles » à ces produits. En d'autres termes, les répondants qui connaissent les incitatifs financiers ont à la fois beaucoup plus tendance que la moyenne à préférer les produits portant l'étiquette ENERGY STAR en général et à être prêt à payer davantage pour un produit portant cette étiquette.

Ceux qui ont acheté des produits ENERGY STAR dans le passé et ceux qui se préoccupent de l'environnement ont aussi plus tendance à préférer les produits portant l'étiquette ENERGY STAR en général et ont un peu plus tendance à préférer ces produits s'ils coûtent plus cher. Ils n'ont toutefois pas autant tendance à préférer les produits portant l'étiquette ENERGY STAR que ceux qui connaissent les incitatifs financiers.

On a aussi demandé aux répondants s'ils ont ou non acheté ou cherché à acheter des produits de plusieurs catégories au cours de la dernière année. Les résultats montrent qu'au cours de cette période, les répondants ont le plus souvent acheté des appareils ménagers et des produits d'éclairage, suivi des produits de bureau pour la maison, des appareils électroniques, des matériaux de construction et de l'équipement de chauffage et de refroidissement.

Tous les répondants qui ont acheté des produits de l'une de ces catégories au cours de la dernière année ont plus tendance que la moyenne à dire qu'ils connaissent ENERGY STAR, tant spontanément qu'avec aide. En ce qui concerne les diverses catégories, les répondants qui ont acheté un appareil ménager ou un produit d'éclairage ont plus tendance que ceux qui ont acheté des produits d'autres catégories à dire qu'ils connaissent ENERGY STAR. Les répondants qui ont acheté des appareils électroniques ont moins tendance à connaître ENERGY STAR que ceux qui ont acheté des produits d'autres catégories, mais ils ont plus tendance que la moyenne à prétendre le connaître.

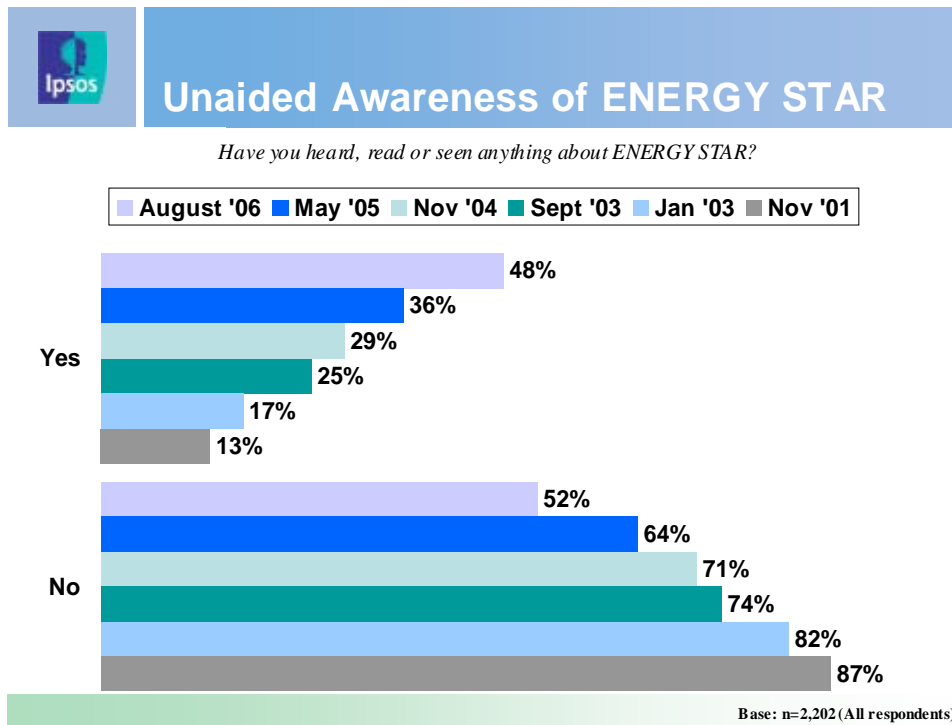
# DETAILED FINDINGS

## Awareness and Understanding of ENERGY STAR

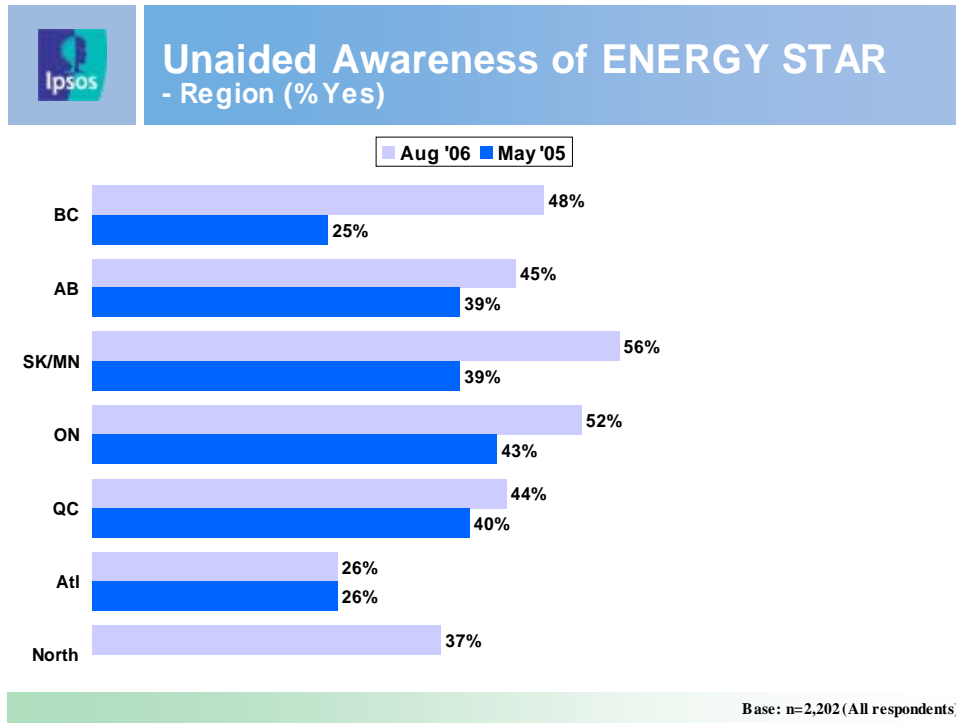
### Unaided Awareness of ENERGY STAR

#### Unaided Awareness among Telephone Respondents

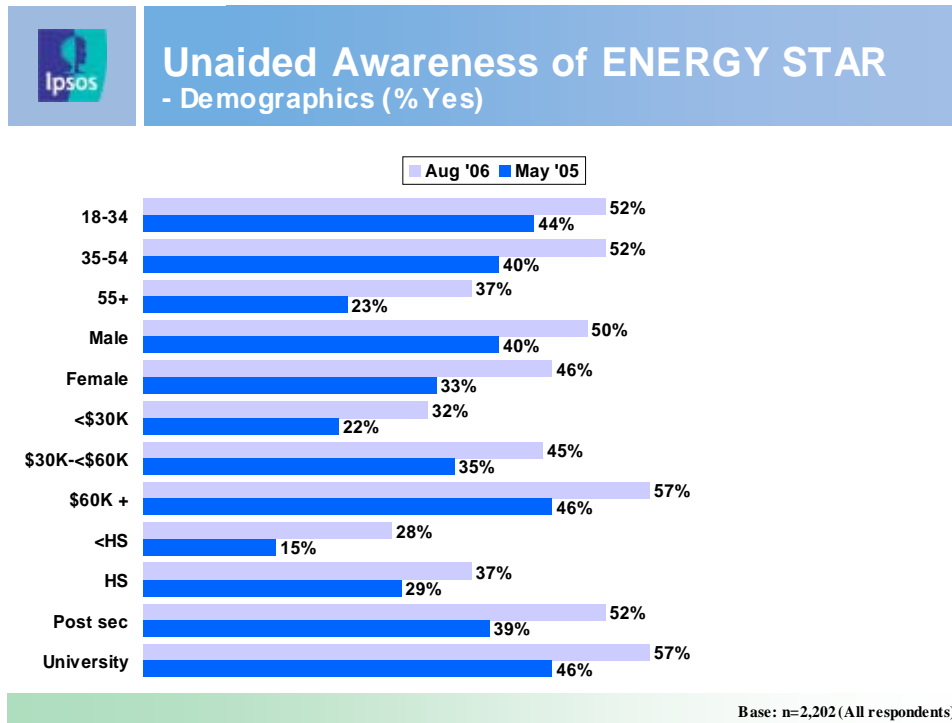
When respondents were asked if they had heard, read, or seen anything about ENERGY STAR, nearly half of Canadians (48%) said they had. This represents a significant increase in unaided awareness since May 2005 (36%), and continues the steady growth in unaided awareness since the first iteration of this research in November 2001 (when only 13% said they had heard of ENERGY STAR).



Regionally, unaided awareness of ENERGY STAR is highest among residents of Saskatchewan and Manitoba (56% up 17 points from 39% in 2005). Meanwhile awareness has grown the most among residents of British Columbia (48% up 23 points from 25% in 2005).

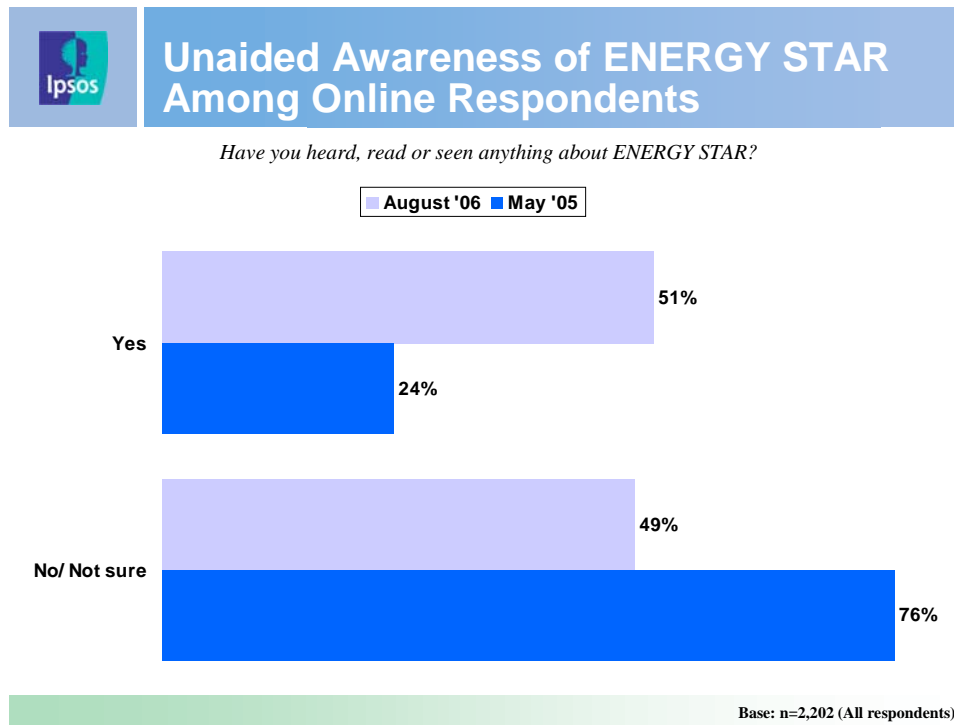


As in 2005, younger respondents, men, and those with higher levels of educational attainment and income are more likely than others to profess awareness of ENERGY STAR. That said, significant gains in awareness have been achieved among older respondents (55 years and older: 37% up 14 points from 23% in 2005) and among those with lower levels of education (less than high school: 28% up 13 points from 15% in 2005). In addition, a gender gap in awareness has narrowed between women (46%) and men (50%).



## Unaided Awareness among Online Respondents

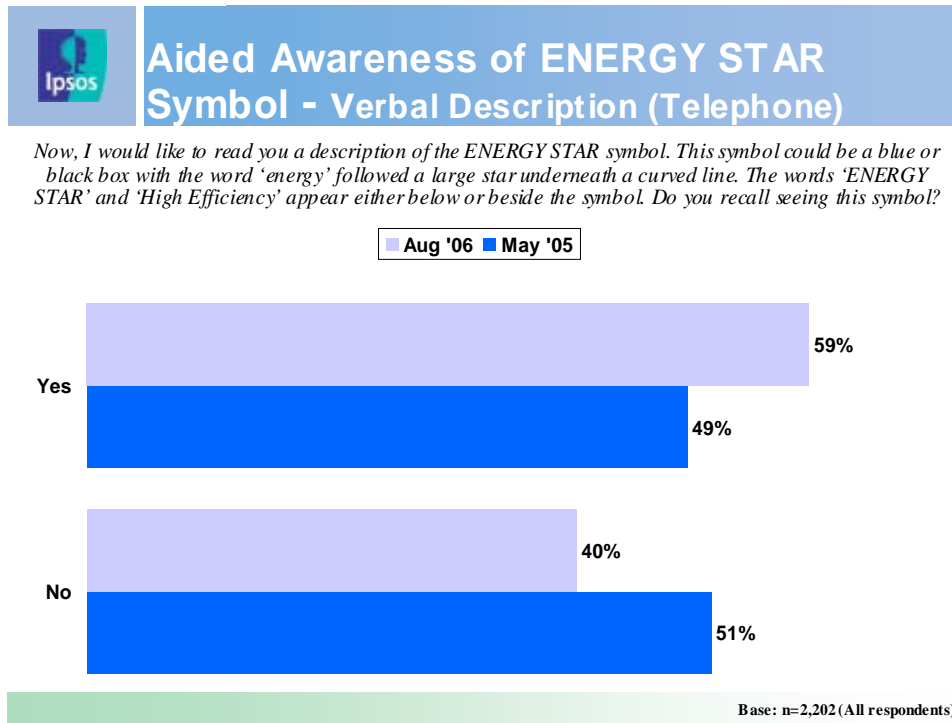
Respondents online were also asked if they had heard, seen or read anything about ENERGY STAR. Like respondents by telephone, half of respondents online claim awareness (51%). This represents a significant increase from 2005, when 24% of respondents online professed awareness.



## Aided Awareness of ENERGY STAR Symbols

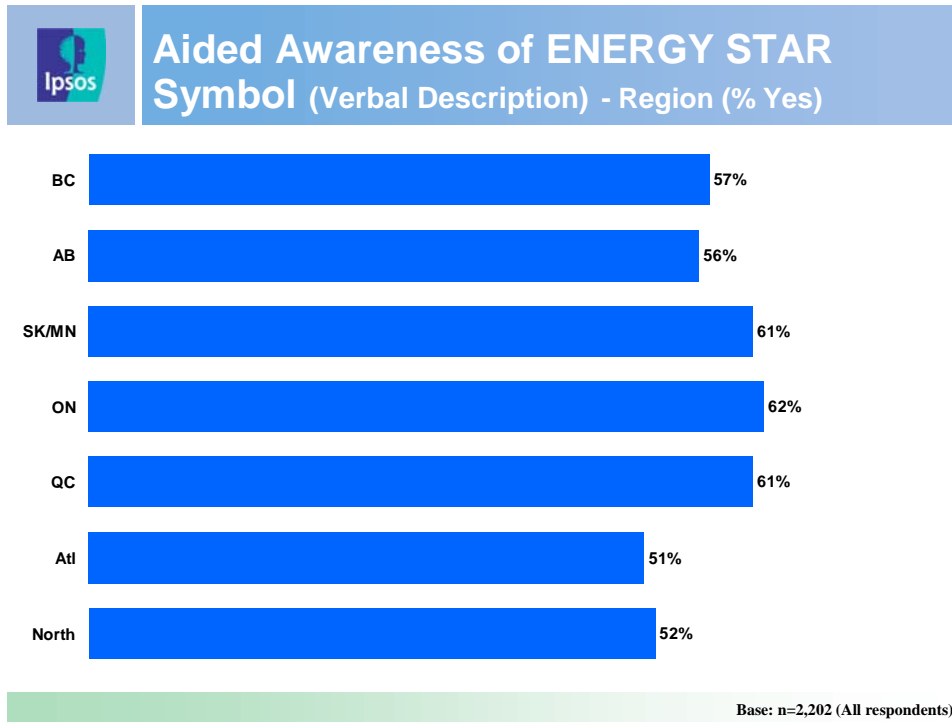
### Aided Awareness among Telephone Respondents (Verbal Description)

In addition to unaided awareness of ENERGY STAR, respondents (by telephone) were read a brief description of the ENERGY STAR symbol and asked whether they could recall seeing the symbol. Three in five (59%) do recall the symbol, up from 49% in 2005.<sup>1</sup>

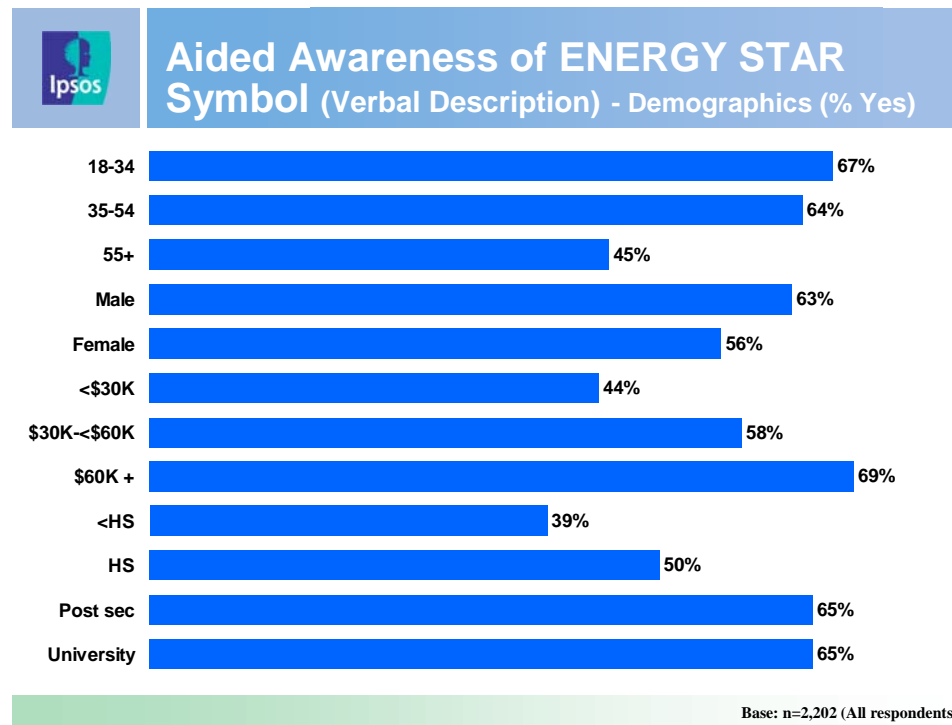


Regionally, aided awareness of the ENERGY STAR symbol is highest among telephone respondents from Ontario, Saskatchewan and Manitoba and lowest among respondents from the Atlantic Provinces and the North.

<sup>1</sup> The symbol described is an updated version of the ENERGY STAR symbol. This version of the symbol was first tested in 2004 along with the traditional version of the symbol. On that occasion the traditional symbol was tested first in the survey and the new version of the symbol was tested second. Last year both the traditional and new versions of the symbol were tested with the new version in first place and the traditional version in second place. During fieldwork a source of order bias was detected where higher awareness was attributed to the symbol described first and lower awareness to the symbol described second. As such, in order to accurately track the results it is necessary to consider only those respondents who heard the description of the new (current) symbol first. This tracking is based on 1,098 cases from 2005 who heard the new symbol described first and were therefore uninfluenced by the description of the traditional symbol.



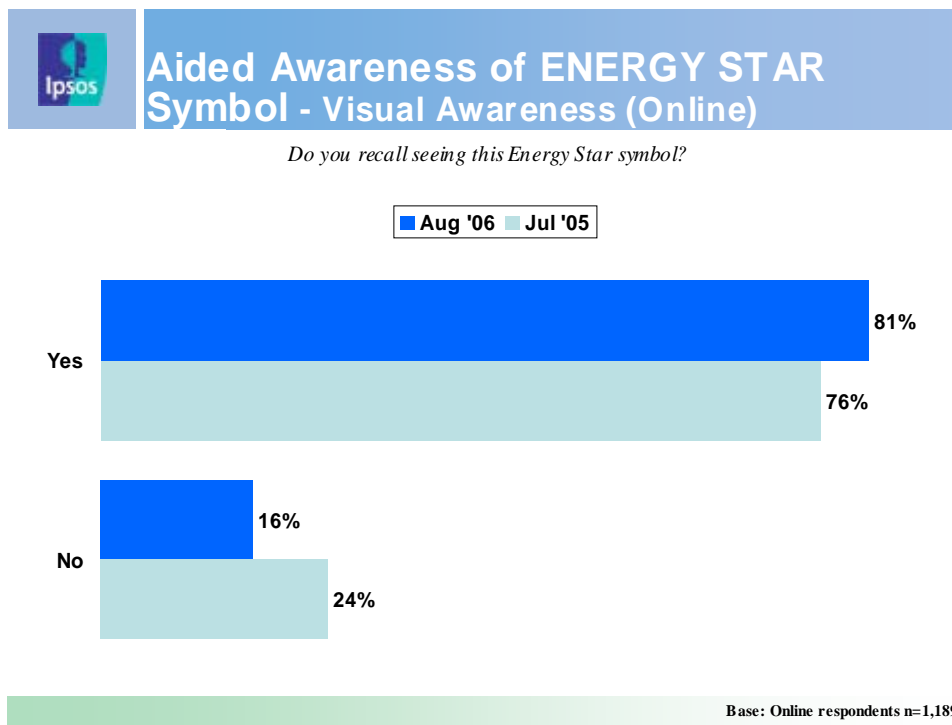
Among demographic subgroups, aided awareness of the ENERGY STAR symbol (both by telephone and online) is highest among younger respondents and men, as well as those with higher levels of income and educational attainment.



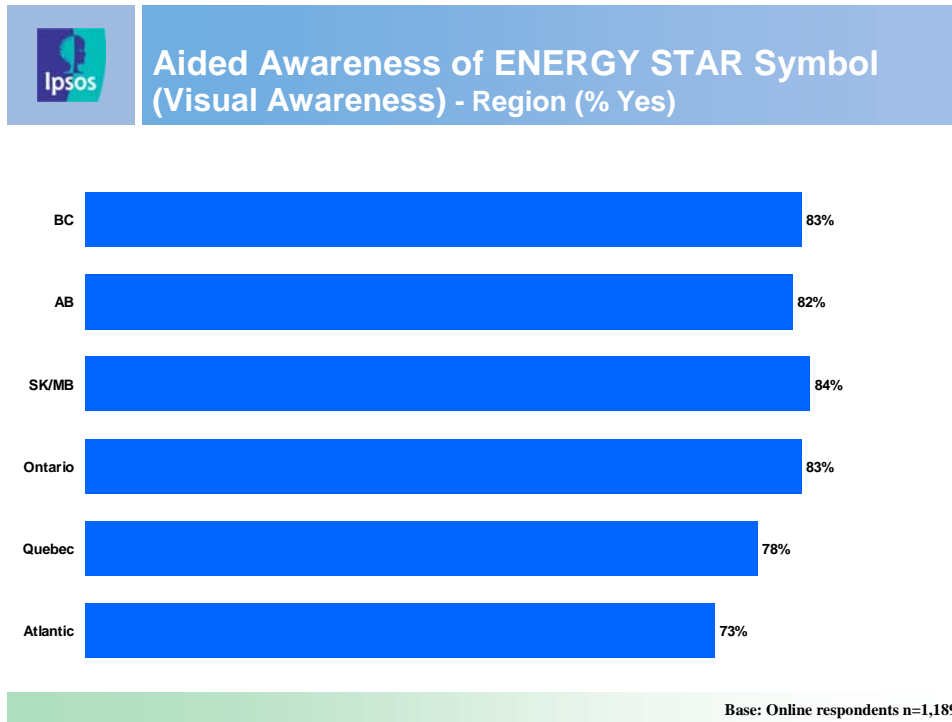
## Aided Awareness among Online Respondents (Visual Awareness)

In order to better gauge awareness of the actual symbols, visual recall of the ENERGY STAR symbol was tested among respondents online using an image of the symbol, rather than a description of it.

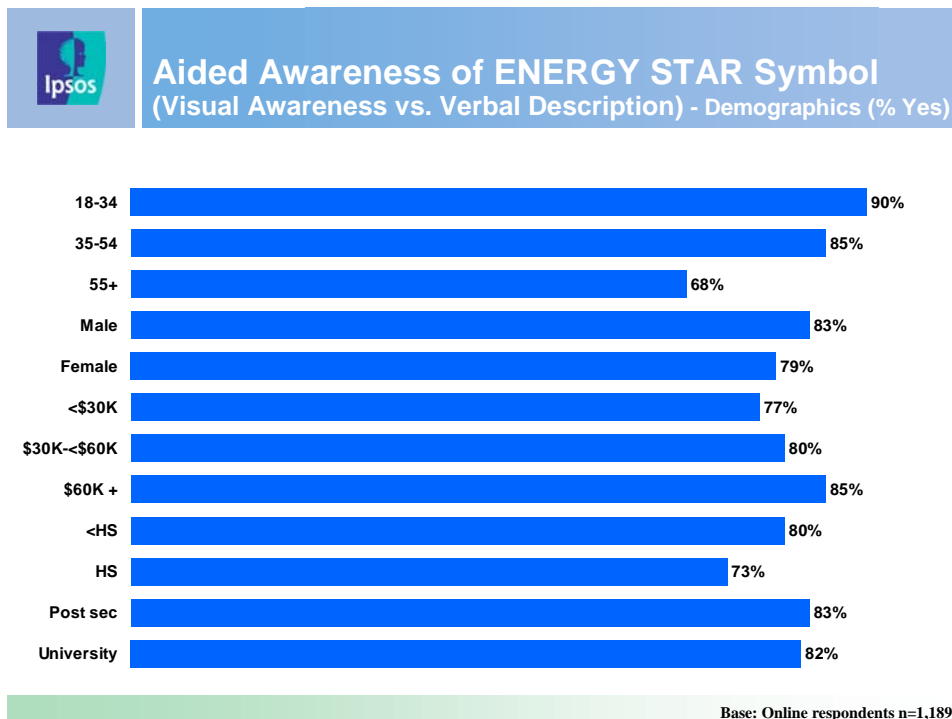
As in 2005, the results find that visual awareness of the ENERGY STAR symbol is significantly higher than awareness based on a verbal description (81% online versus 59% by telephone). In addition, since 2005, visual awareness of the ENERGY STAR symbol has increased modestly from 76% to 81%.



Regionally, visual awareness of the ENERGY STAR symbol is fairly consistent, with exception to lower awareness among residents of the Atlantic Provinces.



Among demographic subgroups, aided awareness of the ENERGY STAR symbol (both by telephone and online) is highest among younger respondents. Differences in visual awareness of the symbol tend to be less pronounced by gender, income and education level than were found in the telephone survey.

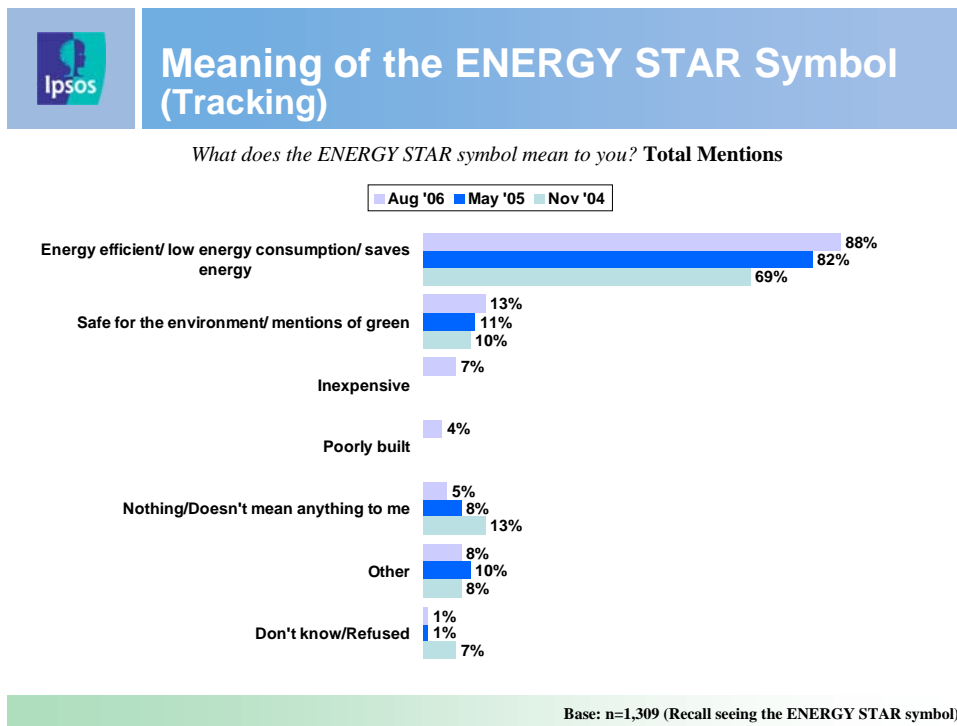


### Meaning of ENERGY STAR Symbol

Telephone respondents aware of the ENERGY STAR symbol were asked on an open-ended basis what the symbol means.

On this basis, most respondents say the symbol stands for energy efficiency, low energy consumption or energy savings (88%). The proportion who say this continues to grow, up from 69% in November 2004.<sup>2</sup>

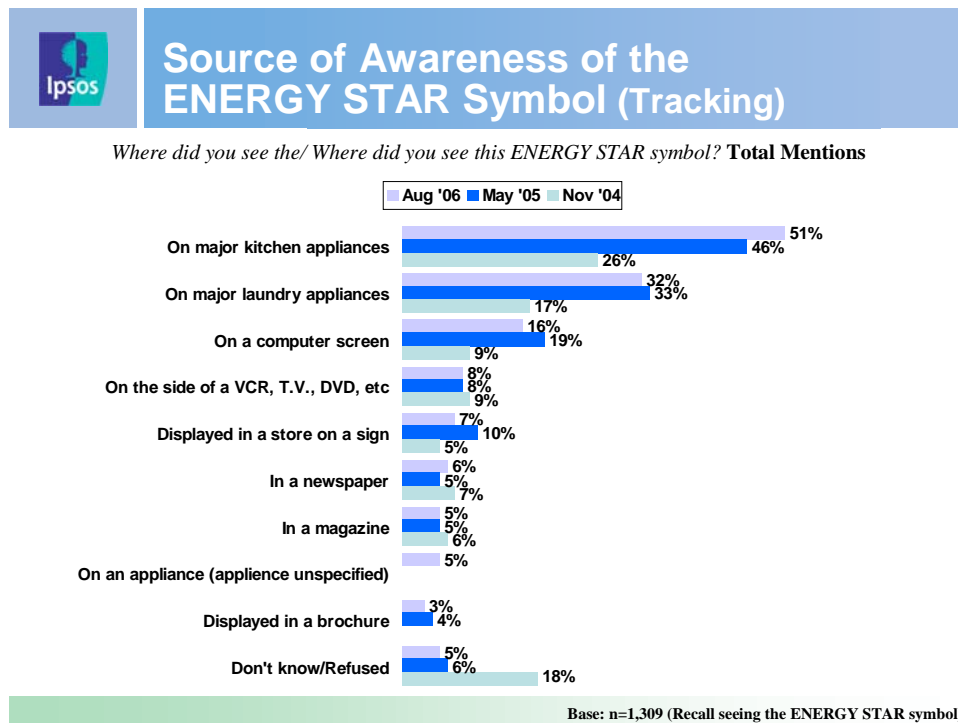
This response is distantly followed by those who say the symbol means environmental safety (13%).



<sup>2</sup> The meaning of the ENERGY STAR symbol is tracked with those who expressed awareness of the new ENERGY STAR symbol. Among those who in earlier years expressed awareness of the old symbol, energy efficiency was also most commonly mentioned as the meaning of the symbol (at 80% in 2005, up from 54% in 2001).

### Location of ENERGY STAR Symbol

Respondents aware of the ENERGY STAR symbol were asked where they recall seeing the symbol. Respondents most often say they recall seeing the ENERGY STAR symbol on major kitchen appliances (51%), on major laundry appliances (32%) or on a computer screen (16%).

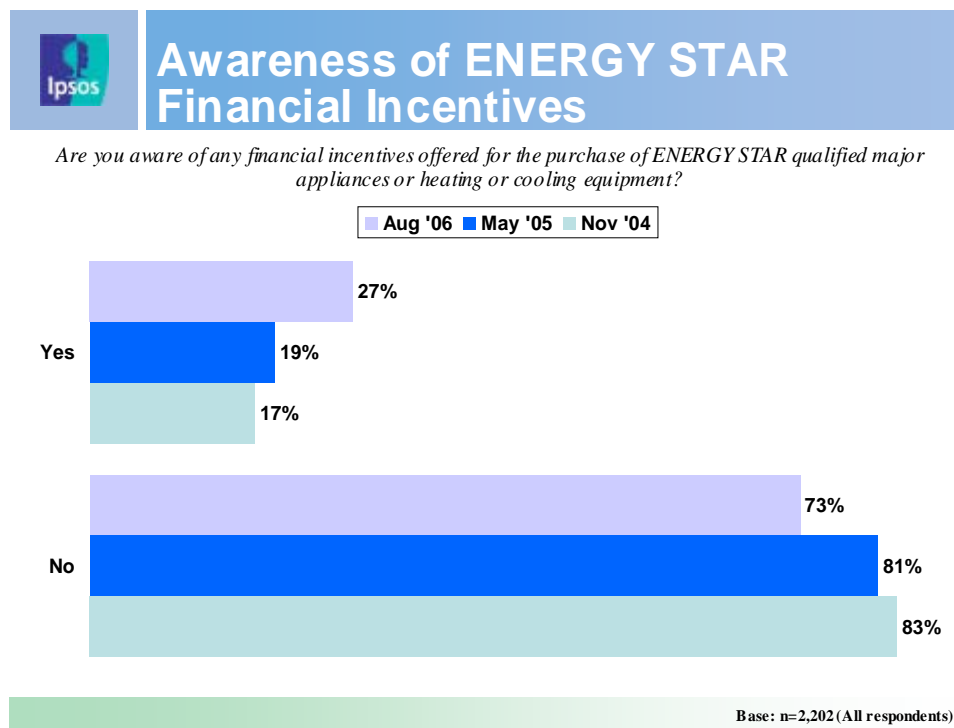


On a tracking basis, recollection of the ENERGY STAR symbol on major kitchen and laundry appliances as well as computer screens has grown significantly since 2004. Those who don't know where they saw the symbol declined from 18% in November 2004 to 5% in August 2006.

# Awareness and Understanding of ENERGY STAR Financial Incentives

## Awareness of ENERGY STAR Financial Incentives

All respondents were asked if they were aware of any financial incentives offered for the purchase of ENERGY STAR qualified major appliances or heating or cooling equipment. Just over one in four Canadians said they were aware of the financial incentives (27%). This result represents an increase from the May 2005 (19%) and November 2004 soundings (17%).

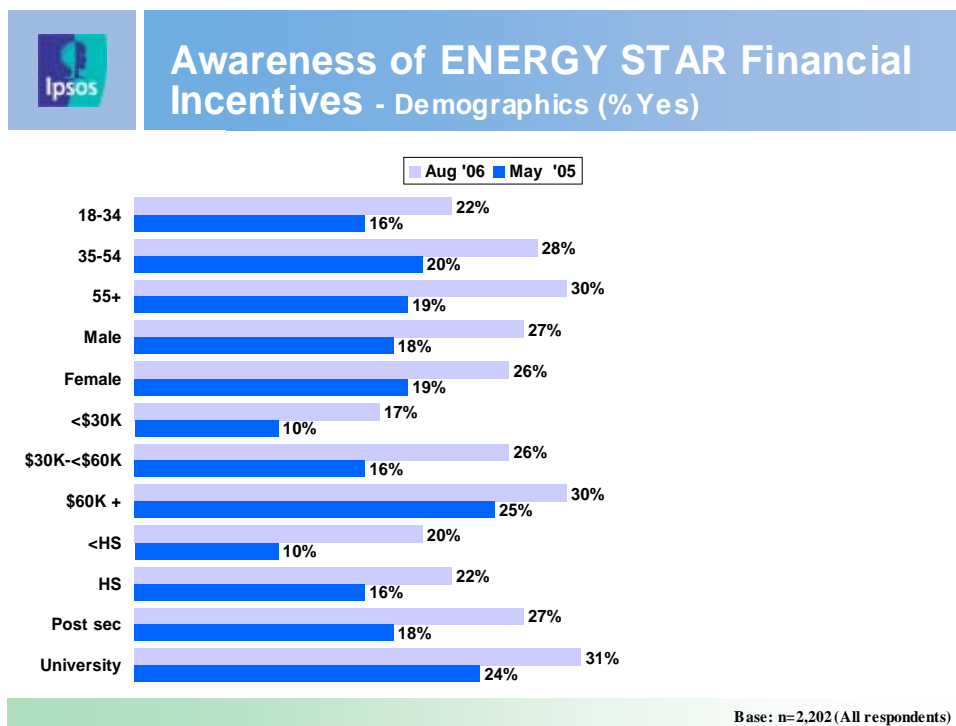
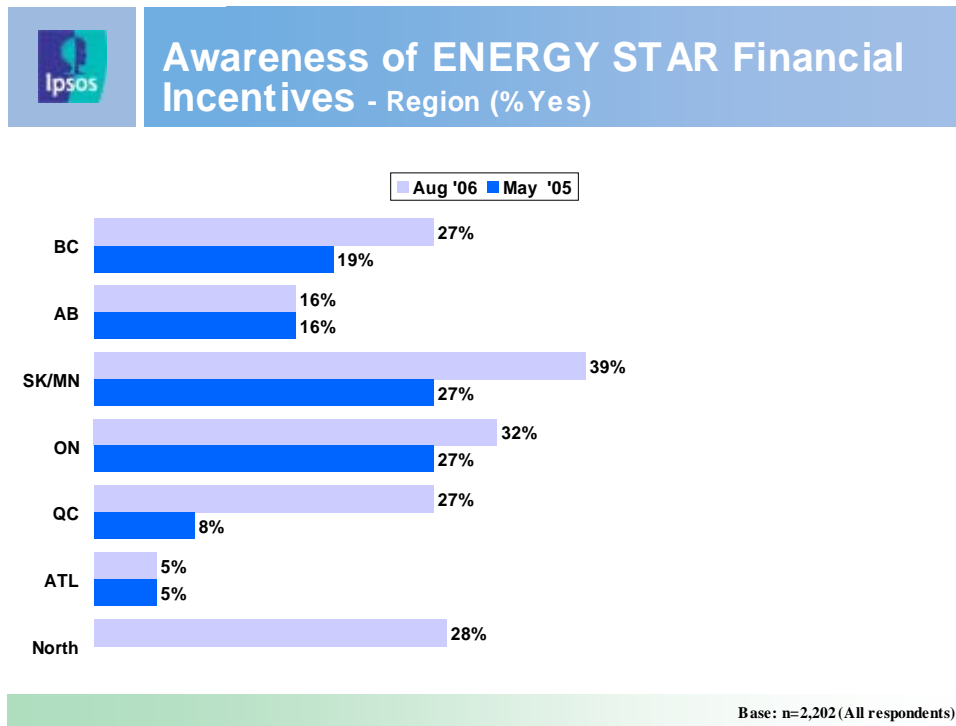


Awareness of the ENERGY STAR financial incentives is highest among residents of Saskatchewan and Manitoba (39%, led by residents of Saskatchewan at 52% compared to 28% among residents of Manitoba) and Ontario (32%). It has grown significantly among residents of Quebec (to 27% from 8% in 2005) and British Columbia (to 27% from 19% in 2005).

Among the major demographic subgroups, awareness of ENERGY STAR financial incentives is greatest among high-income earners (\$60,000 or more: 30%) and among those with higher levels of educational achievement (university: 31%). Awareness of

financial incentives has grown significantly among all major demographic subgroups since 2005.

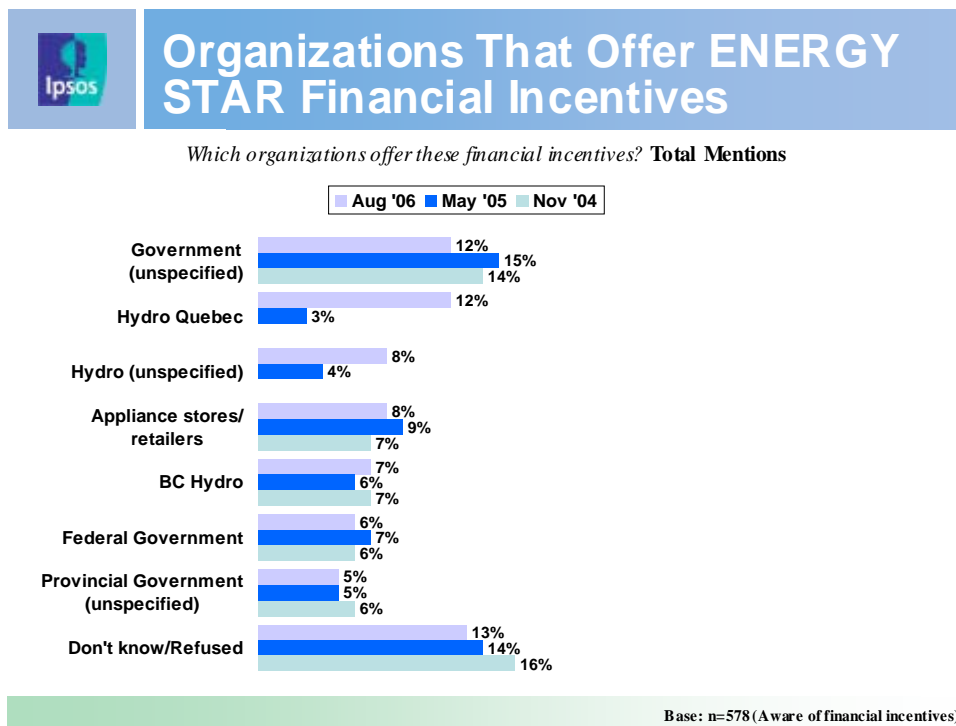
The following charts illustrate awareness of incentives by demographic subgroups:



### Organizations that offer ENERGY STAR Financial Incentives

Respondents who were aware of financial incentives available for the purchase of major appliances or heating or cooling equipment were asked which organizations offer these incentives. Respondents most commonly mention government (unspecified) (12%) and Hydro Quebec (12%, mentioned exclusively by Quebec residents). Unspecified mentions of "hydro" (8%), appliance stores/retailers (8%), BC Hydro (7%, indicated exclusively by residents of British Columbia), the federal government (7%) and provincial governments (5%) were most commonly named as organizations offering ENERGY STAR financial incentives.<sup>3</sup> An additional 13% do not know or could not answer.

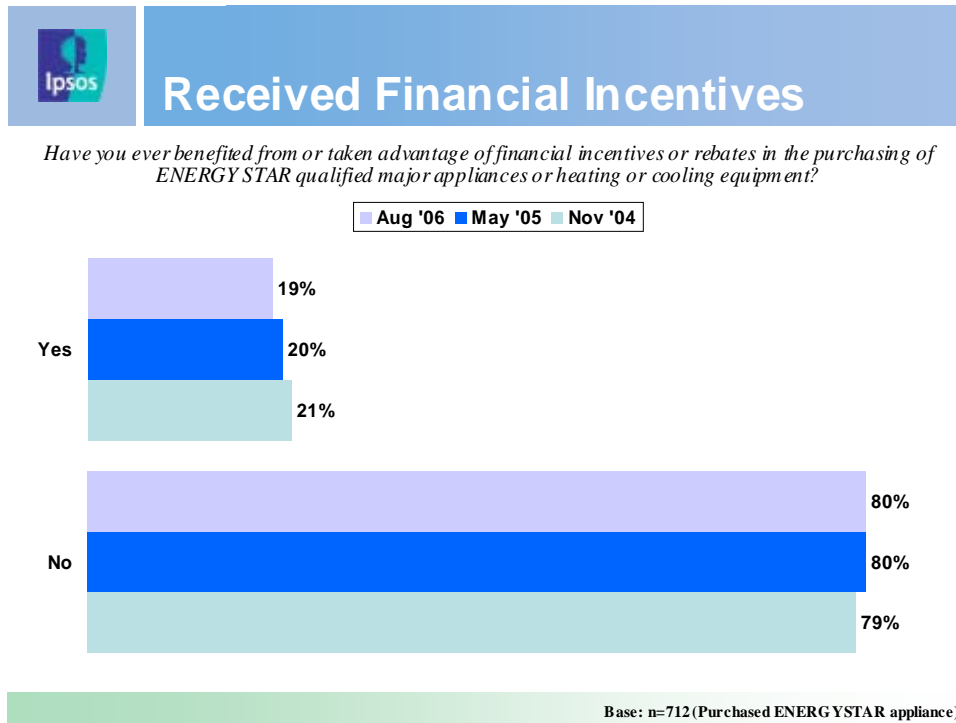
Since 2005, it is worth noting the significant increase in the mention of Hydro Quebec as an organization offering financial incentives.



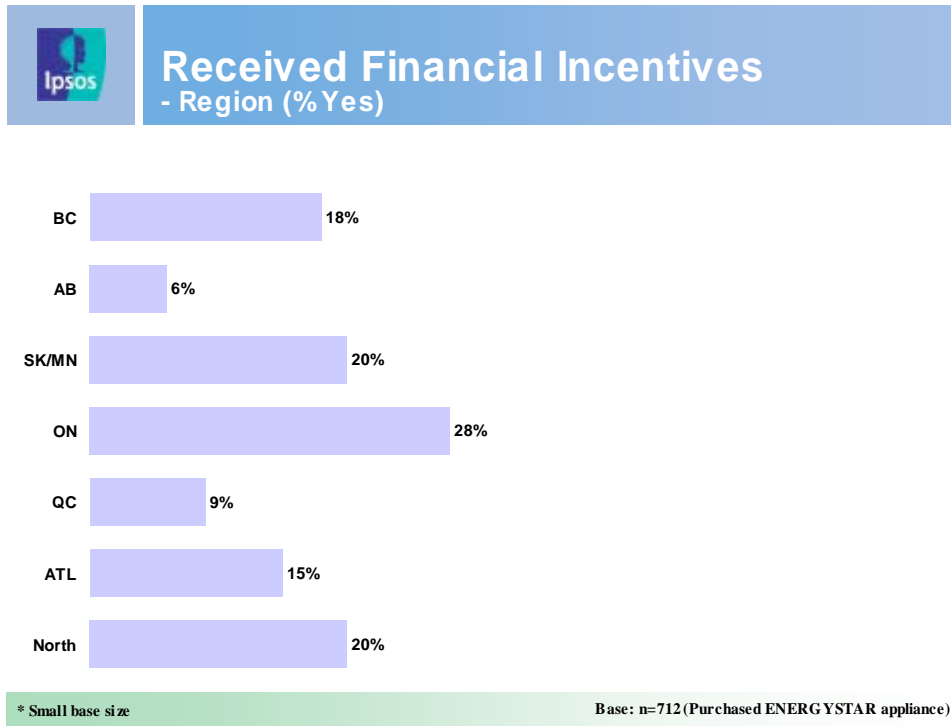
<sup>3</sup> Numbers based on total mentions. Accepted up to three responses

### Receiving Financial Incentives

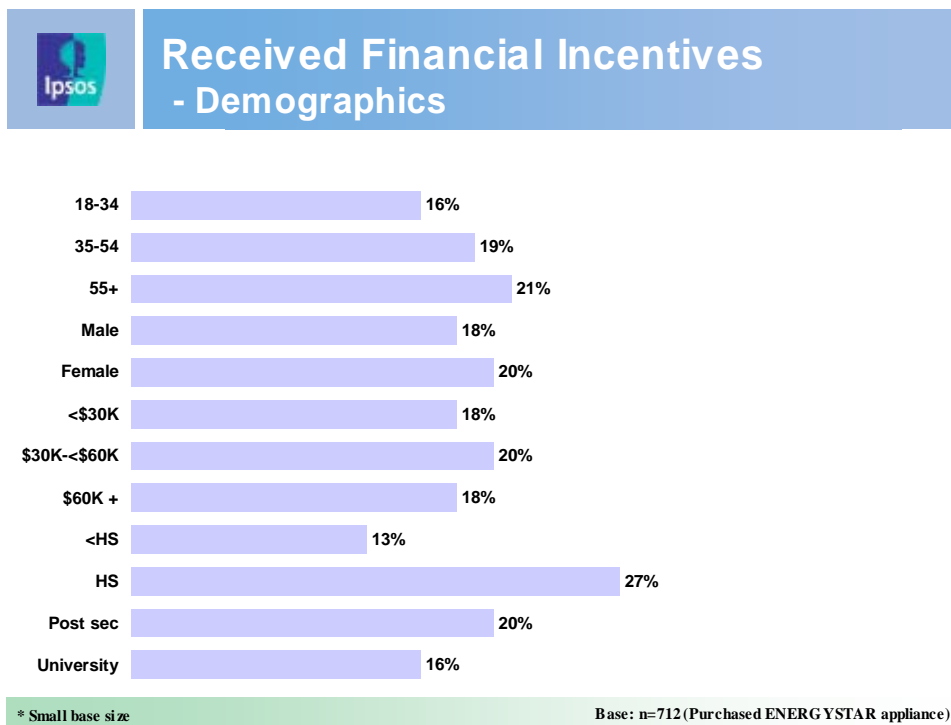
Respondents who said they had purchased ENERGY STAR qualified major appliances or heating or cooling equipment were asked if they had benefited from or taken advantage of financial incentives or rebates in the purchasing of ENERGY STAR products. One in five (19%) of these respondents said that they had taken advantage of the incentives. This result is virtually unchanged from November 2004 (21%).



Residents of Ontario (28%) are most likely to say they have benefited from financial incentives when they purchased and ENERGY STAR-qualified appliance. Albertans (6%) and Quebec residents (9%) are least likely to say this.



Among the demographic subgroups, respondents with a high school education are notably more likely than others to say that they have received a financial incentive resulting from the purchase of an ENERGY STAR product.



### *Types of Financial Incentives*

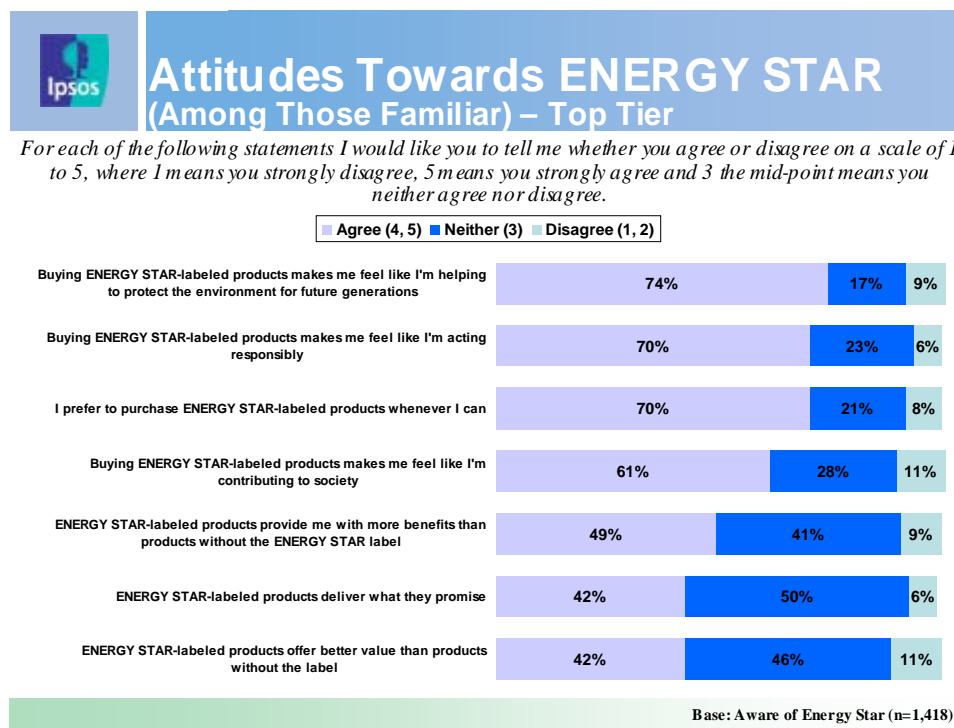
Respondents who said they had they had benefited from or taken advantage of financial incentives or rebates in the purchasing of ENERGY STAR products were asked what kind of incentives or rebates they received. The most common responses describe rebate or discount programs (55%), followed distantly by tax breaks or rebates (13%).

# Loyalty Towards ENERGY STAR

## Attitudes Among Those Aware of ENERGY STAR

Respondents aware of ENERGY STAR<sup>4</sup> were asked whether they agree or disagree with a series of attitudinal statements about ENERGY STAR-labelled products.

Among the statements tested, those aware of ENERGY STAR most often agree that buying ENERGY STAR-labelled products makes them feel that they are helping to protect the environment (74% agree, rating as four or five on a scale of 1 to 5). Similarly, those aware of ENERGY STAR-labelled products also say that buying ENERGY STAR products makes them feel like they are acting responsibly (70%). In addition, seven in ten among those aware of ENERGY STAR also agree that they prefer to purchase ENERGY STAR products whenever they can (70%).

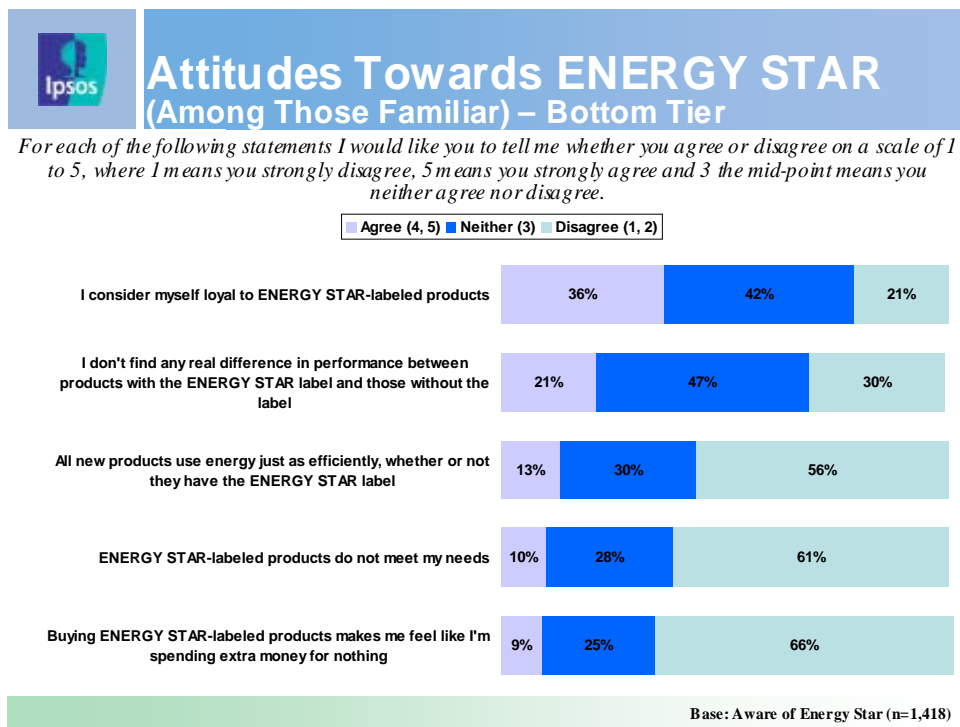


While environmental and social responsibility appear to be key considerations, ENERGY STAR does not mean for most that the products themselves deliver what they promise (42% agree) or that they offer better value than products that do not carry the label

<sup>4</sup> Including respondents who indicated awareness of ENERGY STAR on either an unaided or an aided basis.

(42%). In keeping with this sentiment, the plurality of those aware of ENERGY STAR labelled products rate their view as neutral when asked whether they consider themselves “loyal” to ENERGY STAR-labelled products (42% neutral, rating as 3 on the scale).

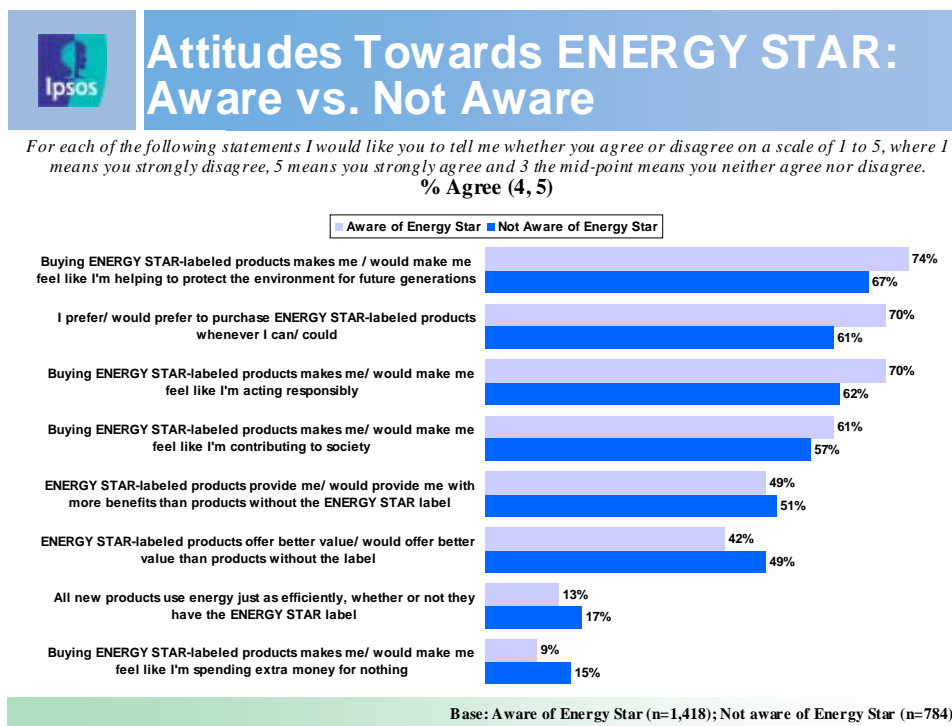
Majorities of those aware of ENERGY STAR *disagree* that ENERGY STAR-labelled products make them feel that they are spending extra money for nothing (66% disagree, rating as 1 or 2 on the scale), that ENERGY STAR-labelled products do not meet their needs (61% disagree) or that all new products use energy just as efficiently whether or not they carry the ENERGY STAR label (56% disagree).



### Attitudes Among Those Not Aware of ENERGY STAR

Those not aware of ENERGY STAR<sup>5</sup> were also asked whether they agree or disagree with several attitudinal statements about ENERGY STAR-labelled products.<sup>6</sup> Before being read the statements, they were read the following information:

*“The international ENERGY STAR symbol is a simple way for consumers to identify products that are among the most energy-efficient on the market. Only manufacturers and retailers whose products meet the ENERGY STAR criteria can label their products with this symbol. Choosing an ENERGY STAR-labelled product over a conventional model could save you hundreds of dollars in energy costs.”*



Among respondents not aware of ENERGY STAR, agreement that ENERGY STAR-labelled products would make them feel that they are protecting the environment, that they would be acting responsibly by purchasing ENERGY STAR-labelled products and

<sup>5</sup> Including respondents who indicated no awareness of ENERGY STAR on either an unaided or an aided basis.

<sup>6</sup> Some statements were modified to reflect a conditional relationship with ENERGY STAR-labelled products. For example, instead of the statement saying “Buying ENERGY STAR labeled products *makes me* feel like I’m helping to protect the environment for future generations,” those not aware of the

that they would prefer to buy ENERGY STAR-labelled products whenever they could earn the highest levels of agreement, as they do among those aware of ENERGY STAR. However, while significant majorities of those not aware of ENERGY STAR do agree with these ideas, their agreement is lower than among those aware of the symbol.

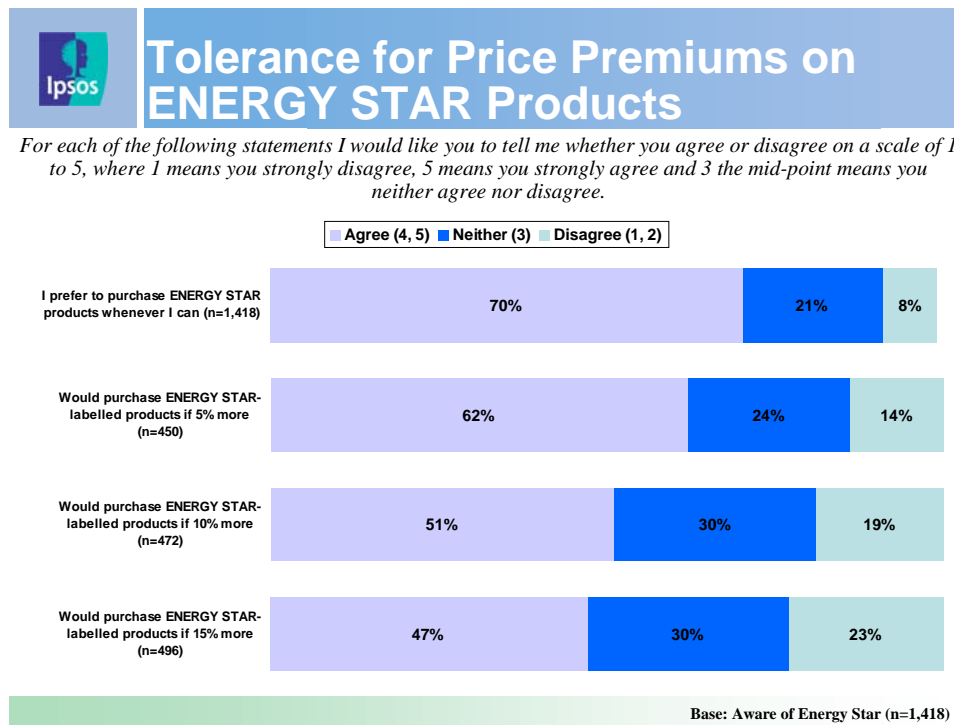
While somewhat less committed to the aspect of environmental and social responsibility that attends awareness of ENERGY STAR, those unaware of ENERGY STAR are more likely than those aware to say that ENERGY STAR-labelled products would provide them with more benefits and better value than other products.

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symbol heard the statement "Buying ENERGY STAR products *would make me* feel like I'm helping to protect the environment for future generations."

### Tolerance for Price Premiums on ENERGY STAR-labelled Products

Those aware of ENERGY STAR<sup>7</sup> were asked whether they would buy an ENERGY STAR labelled product even if it cost 5%, 10% or 15% more than a similar product without the label.<sup>8</sup> In addition, respondents were also asked whether they prefer to buy ENERGY STAR products whenever they can (with no premium mentioned).



The results find that seven in ten respondents (70%) express a preference for ENERGY STAR products when no price premium is mentioned. When a 5% price premium for ENERGY STAR-labelled products over similar products that do not carry the label is mentioned, the proportion who says they would buy the ENERGY STAR-labelled product declines to 62%. At a 10% premium, those who say they would buy the ENERGY STAR-labelled product declines sharply to 51%. At a 15% more, those who say they would buy the ENERGY STAR-labelled product declines slightly further to 47%.

<sup>7</sup> Either on an unaided or an aided basis.

<sup>8</sup> To avoid a bias towards lower price premiums the three tested amounts price premiums, 5%, 10% and 15%, were randomized among so that roughly one third of respondents heard 5% more, one third heard 10% and one third heard 15%.

As the chart below shows, those who are aware of financial incentives, those who have purchased ENERGY STAR-labelled products in the past and those who are concerned about the environment are significantly more likely than those unaware of financial incentives, those who have not purchased ENERGY STAR-labelled products and those who are neutral towards the environment<sup>9</sup> to say that they prefer to buy ENERGY STAR-labelled products whenever they can.

	<b>Prefers to buy E* products</b>	<b>Would buy E* product if 5% more</b>	<b>Would buy E* product if 10% more</b>	<b>Would buy E* product if 15% more</b>
Aware of E* (total)	70%	62%	51%	47%
Aware of financial incentives	80%	71%	60%	60%
Not aware of financial incentives	65%	57%	46%	40%
Purchased E* products in past	79%	62%	58%	54%
Has not purchased E* products	63%	62%	44%	42%
Concerned by environmental issues	76%	69%	58%	52%
Neutral towards environmental issues	57%	49%	36%	35%

“E\*” equals “ENERGY STAR”  
 Percent equals “agree,” rating as 4 or 5 on the scale.

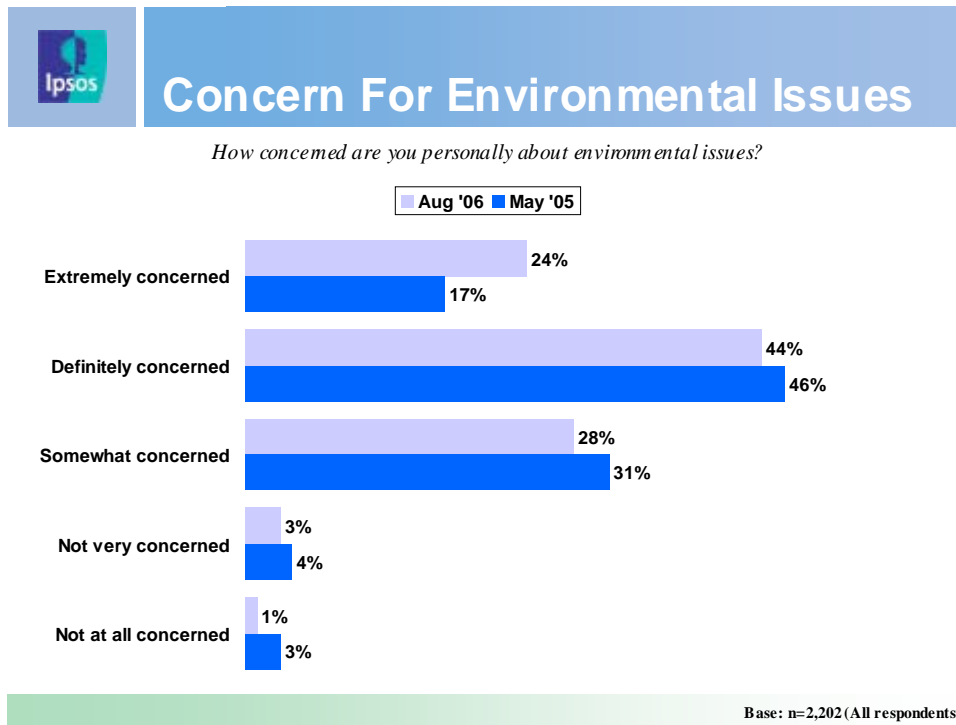
As price premiums are introduced, the findings show that those aware of financial incentives are more loyal to ENERGY STAR than those who have purchased ENERGY STAR products in the past and those who are concerned by environmental issues as suggested by the rate of decline in willingness to purchase and ENERGY STAR appliance even if it is more expensive. More specifically, willingness to buy an ENERGY STAR product drops 20 points from simple preference (80%) to preference even at a 15% premium (60%). By comparison, willingness to buy an ENERGY STAR product drops by 25 and 24 points, respectively among those who have purchased ENERGY STAR products in the past and those who are concerned by environmental issues.

<sup>9</sup> Please note that because only a few participants (n=40) aware of ENERGY STAR say they are not concerned about environment issues, these respondents have not been reported here.

# Impact of Environmentalism

## Concern for Environmental Issues

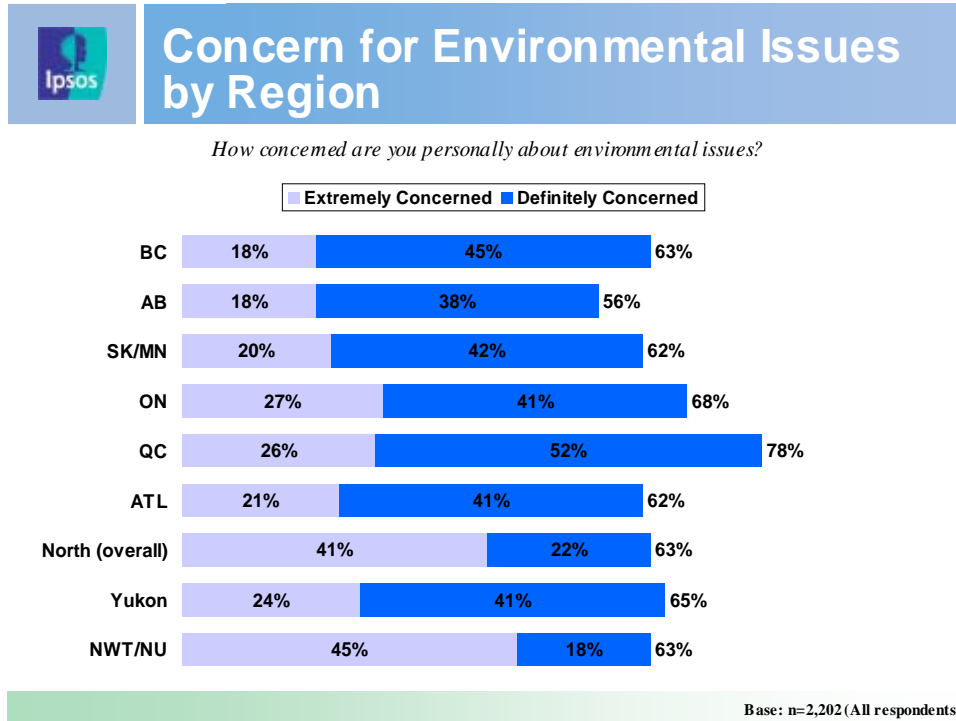
All respondents were asked whether or not they are personally concerned about environmental issues. Over two in three respondents (68%) say they are either extremely (24%) or definitely (44%) concerned about environmental issues. An additional 28% say they are somewhat concerned, while just 4% say they are not very concerned (3%) or not at all concerned (1%) by environmental issues.



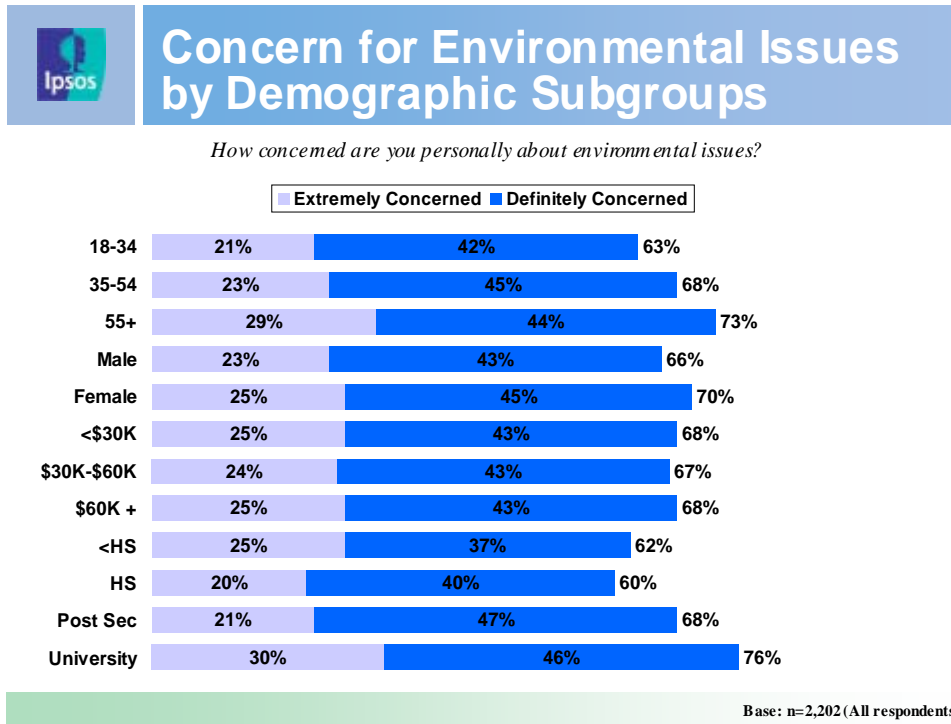
Regionally, extreme concern over environmental issues is highest among residents of the North overall (41%), and particularly among residents of the Northwest Territories and Nunavut (45%). Yukoners reflect the national average level of extreme concern (24%).

Among southern Canadians, extreme concern is highest among residents of Ontario (27%) and Quebec (26%). Quebecers are most likely nationwide to say they are either extremely or definitely concerned about the environment (78%).

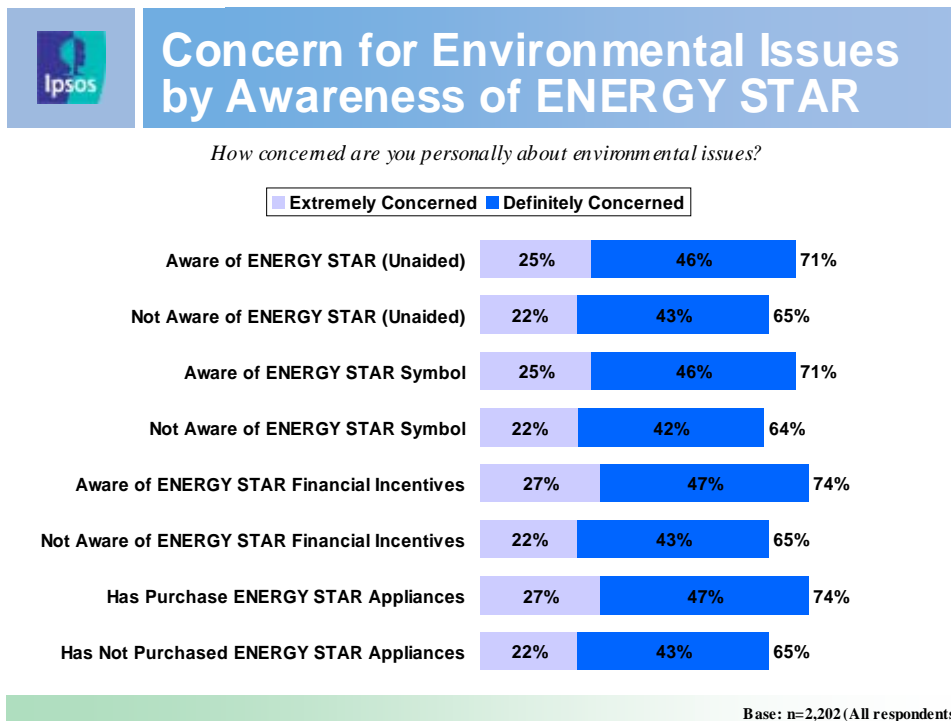
Extreme concern about the environment is lowest among residents of British Columbia (18%) and Alberta (18%). Albertans are least likely nationwide to say they are either extremely or definitely concerned (56%).



Among the demographic subgroups, concern for the environment is highest among older respondents (55 years and older) and those with a university education.



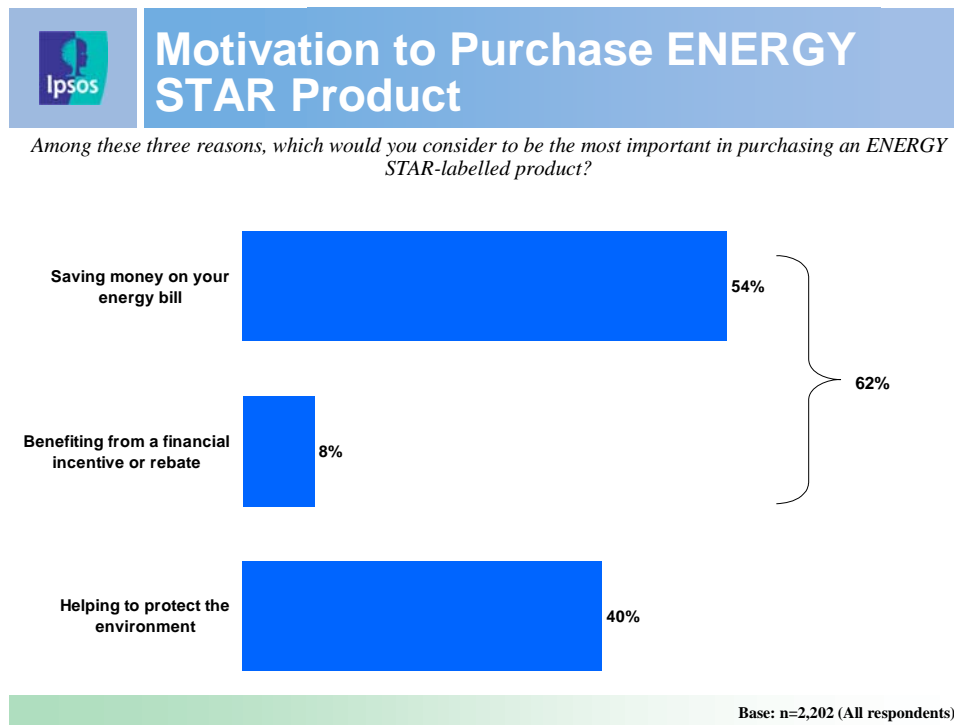
Those who are aware of ENERGY STAR (on either an unaided or an aided basis), those aware of financial incentives associated with ENERGY STAR-labelled appliances and those who have purchased an ENERGY STAR-labelled product demonstrate modestly higher levels of concern about environmental issues.



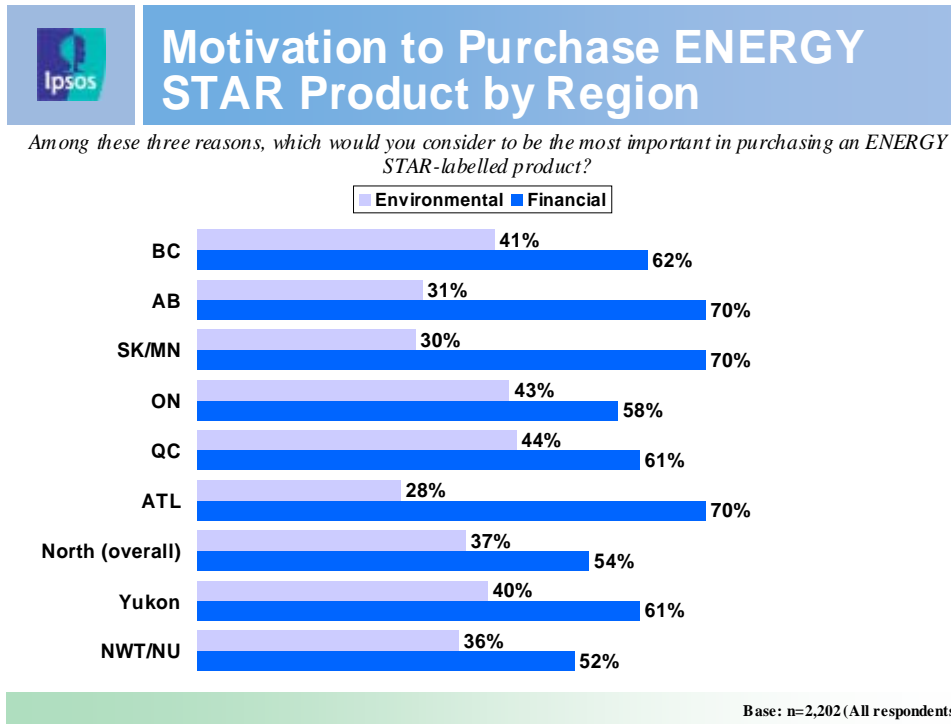
### Motivation to Purchase ENERGY STAR-labelled Product

Respondents were read three possible reasons and asked among them which they would consider to be the most important reason to purchase an ENERGY STAR product.

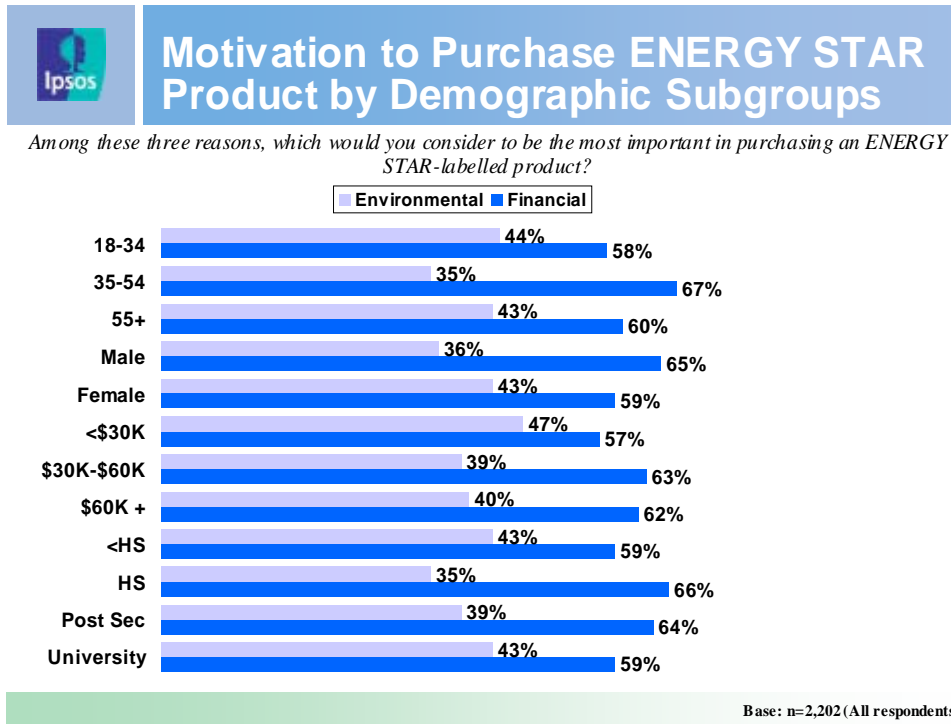
Three in five (62%) choose financial factors, either saving money on energy bills (54%) or benefiting from a financial incentive or rebate (8%), as the most important reasons to buy an ENERGY STAR product. Two in five (40%) choose helping to protect the environment as the most important factor.



Regionally, helping to protect the environment is a greater motivation among residents of Quebec and Ontario, while financial considerations are a greater motivation among residents of Alberta, Saskatchewan and the Atlantic Provinces.



Among demographic subgroups, the environment is a greater motivation among older (55 years or older) and younger respondents (18-34 years), those who earn less than \$30,000, those with less than a high school education and those with a university education. Financial considerations are a greater motivation among those 35 to 54 years of age, men and those with a high school education.

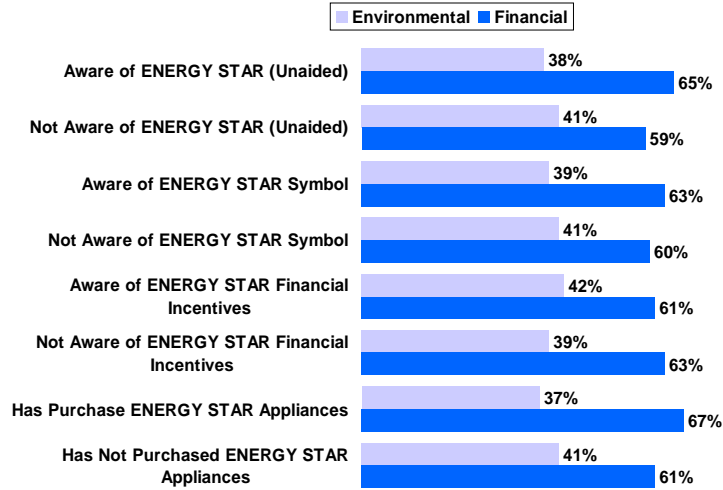


Awareness of ENERGY STAR has a minimal impact on stated motivations to purchase an ENERGY STAR product. That said, it is worth noting that those aware of ENERGY STAR on an unaided basis are more likely than those not aware of ENERGY STAR to say they are motivated by financial considerations. Likewise, those who have purchased ENERGY STAR appliances are also more likely than those who have not to say they are motivated by financial considerations rather than the environment.



## Motivation to Purchase ENERGY STAR Product by Awareness of ENERGY STAR

Among these three reasons, which would you consider to be the most important in purchasing an ENERGY STAR-labelled product?

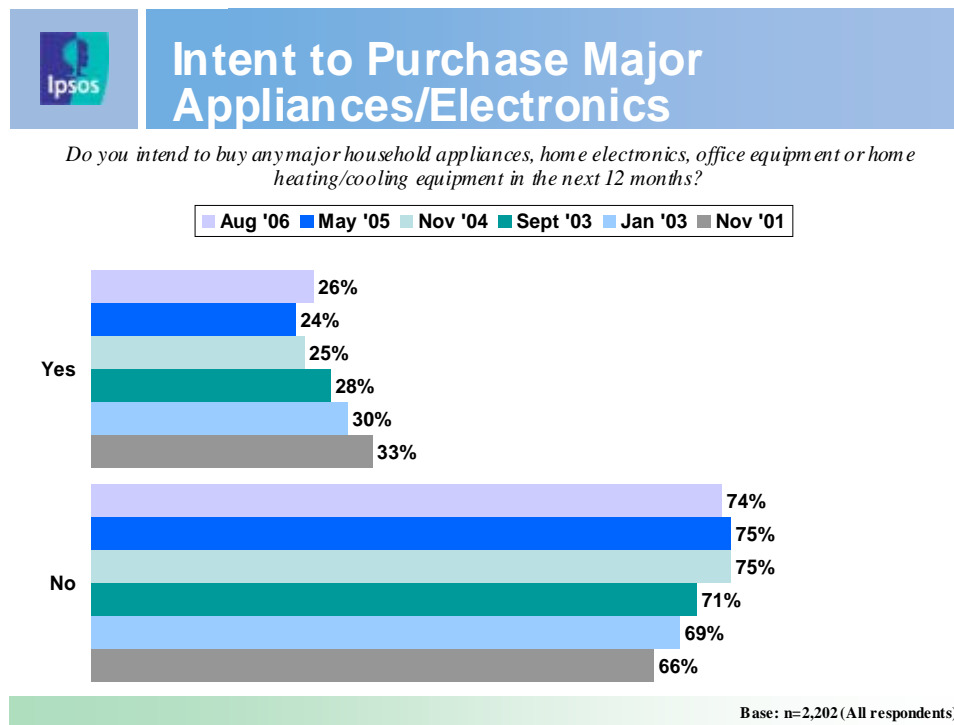


Base: n=2,202 (All respondents)

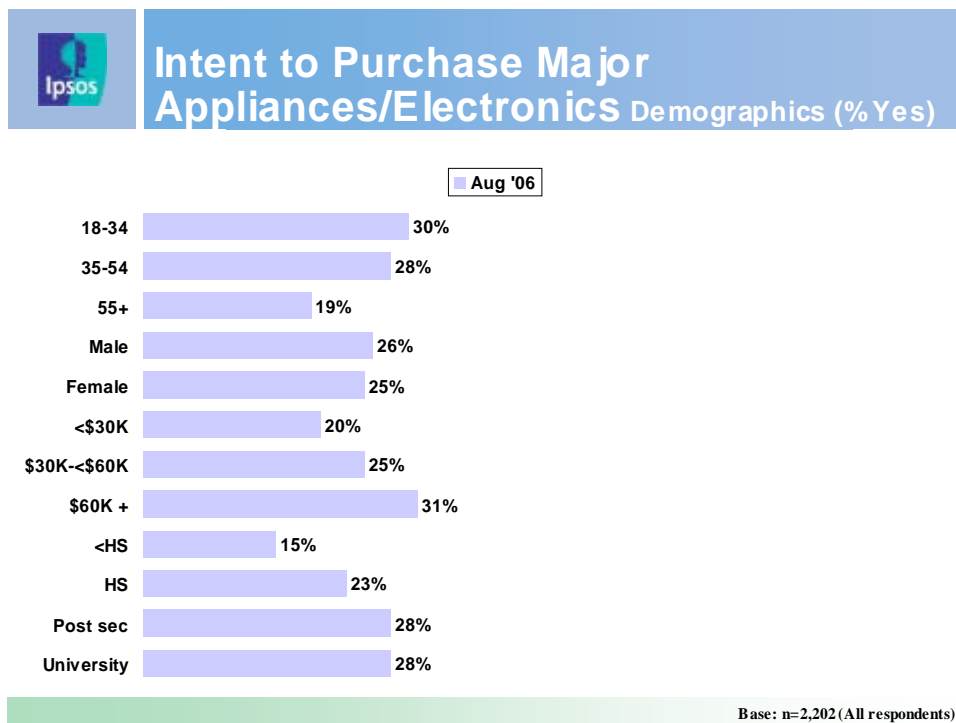
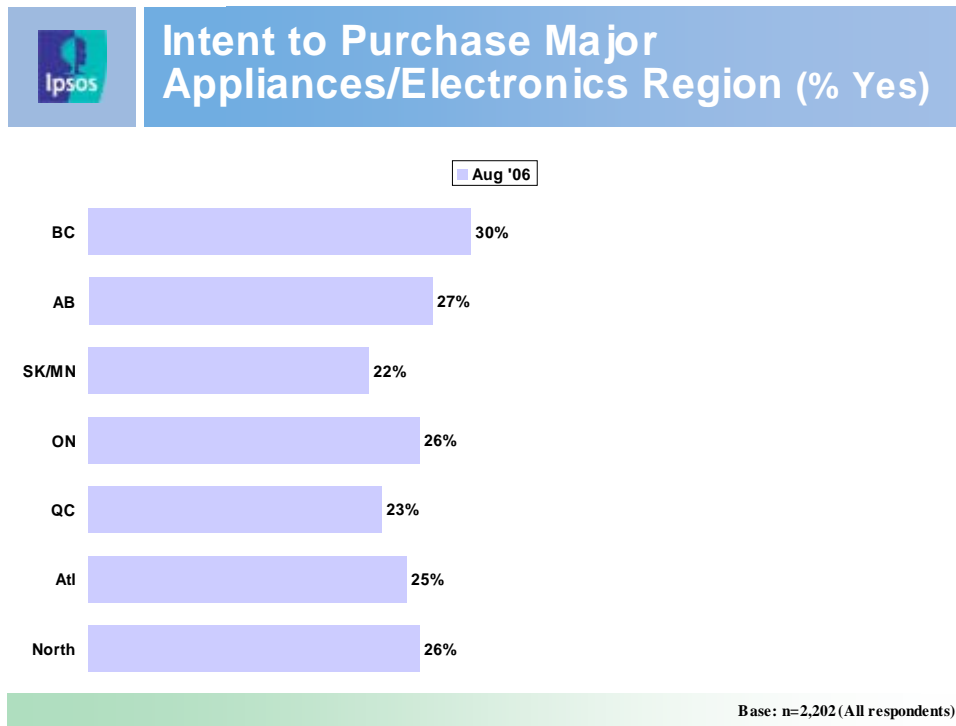
## Consumer Behaviour

### *Intention to Purchase Major Appliances/Electronics*

Respondents were asked if they intended to buy any major household appliances, home electronics, office equipment or home heating/cooling equipment in the next 12 months. One in four (26%) say they intend to purchase such items. The level of those intending to buy a major household appliance has remained consistent with 2005 (24%) and 2004 findings (25%).



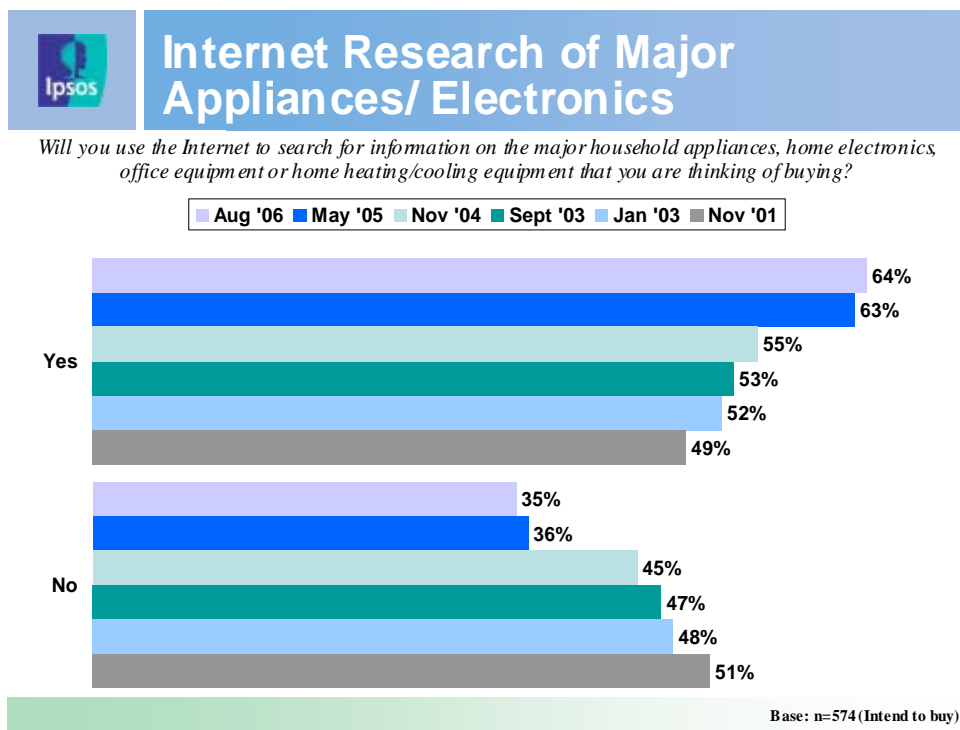
The following charts illustrate intent to purchase major appliances by regional and demographic subgroups:



### Internet Research of Major Appliances/Electronics

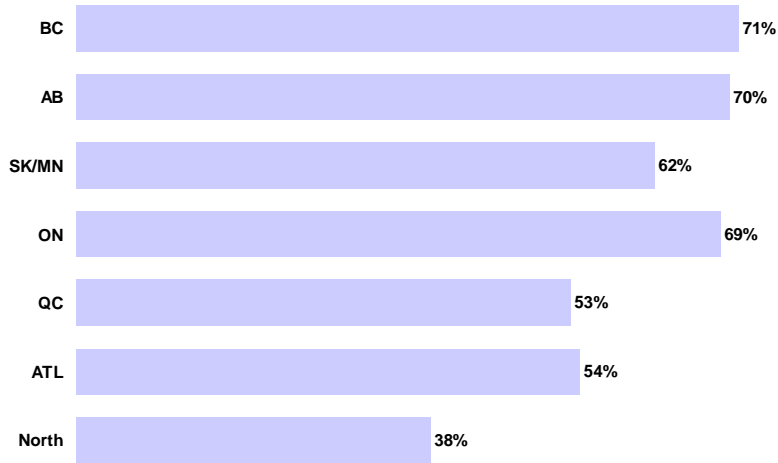
Respondents who said they intended to make a purchase were asked if they would use the Internet to search for information on the major household appliances, home electronics, office equipment or home heating/cooling equipment that they were thinking of buying.

After uninterrupted growth since 2001 in the proportion who intend to use the Internet to search for information on major appliances, the results this year (64%) have remained consistent with 2005 (63%).



The following charts illustrate usage of Internet to research household products according to key regional and demographic subgroups:

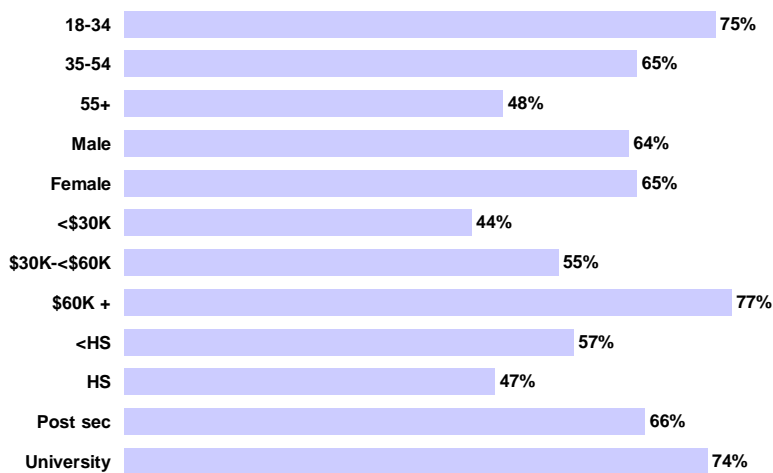
**Ipsos** Internet Research of Major Appliances/Electronics Region (% Yes)



\* Small base size

Base: n=574 (Intend to buy)

**Ipsos** Internet Research of Major Appliances/Electronics Demographics (% Yes)

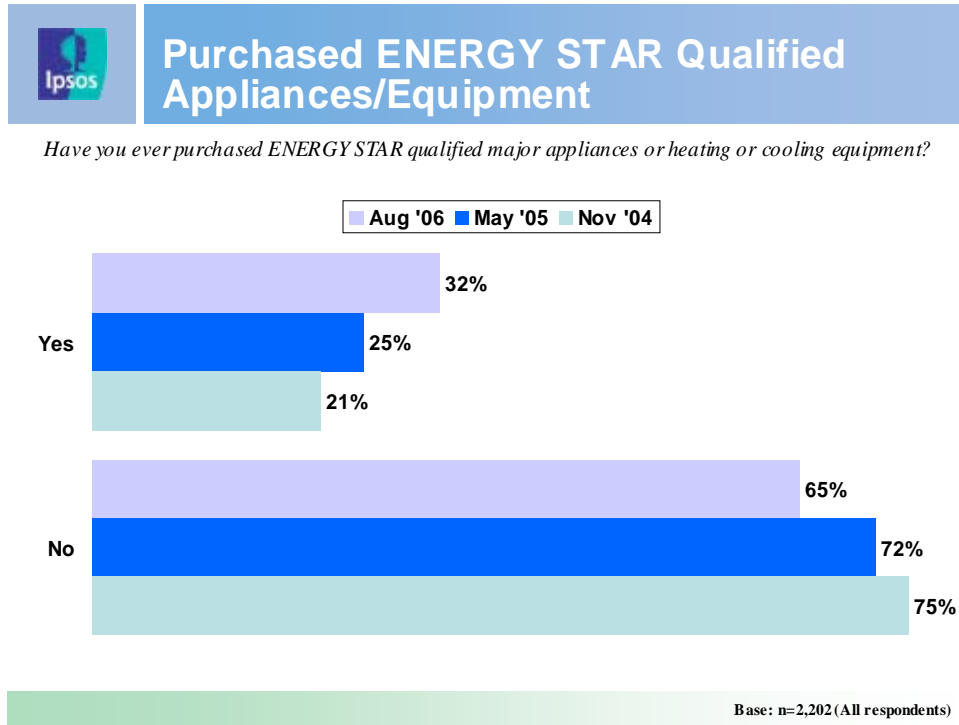


\* Small base size

Base: n=574 (Intend to buy)

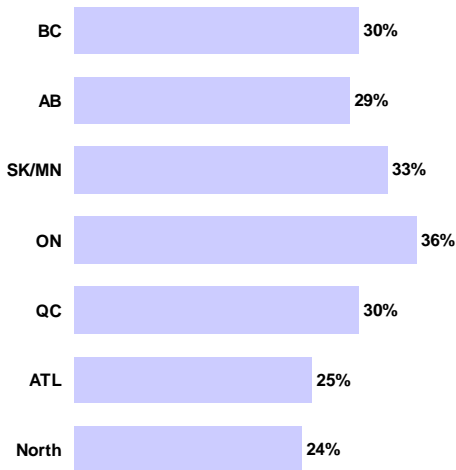
### *Purchased ENERGY STAR Appliances/Equipment*

Respondents were asked if they had ever purchased ENERGY STAR qualified major appliances or heating or cooling equipment. One in three respondents (32%) says they have purchased such a product, continuing growth from 25% in 2005 and 21% in 2004.



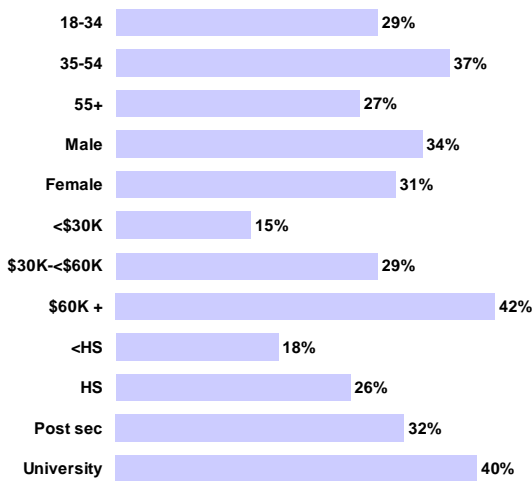
The following charts indicate the proportion who have purchased and ENERGY STAR qualified product by key regional and demographic subgroup:

**Purchased ENERGY STAR Qualified Appliances/Equipment - Region (% Yes)**



Base: n=2,202 (All respondents)

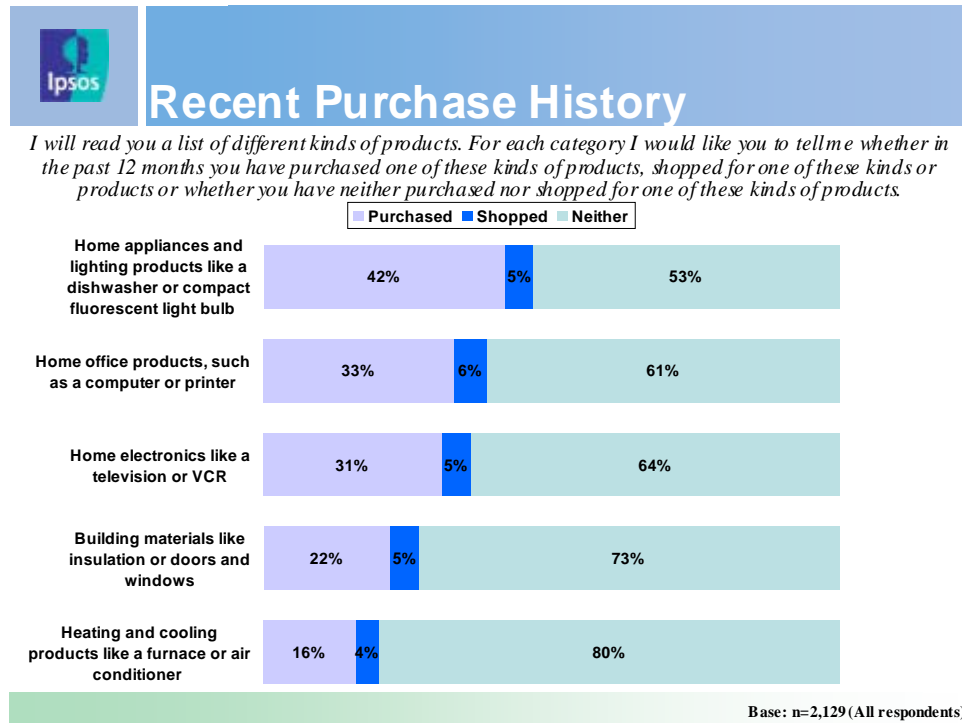
**Purchased ENERGY STAR Qualified Appliances/Equipment - Demographics (% Yes)**



Base: n=2,202 (All respondents)

### Impact of Recent Purchase History on Awareness of ENERGY STAR

Respondents were asked whether they had recently purchased or shopped for one of several major categories of products in the last 12 months. Among the tested categories, respondents most often say they have purchased or shopped for home appliances and lighting products, followed by home office products, home electronics, building materials and heating and cooling products.



The recent purchase of any of the tested categories of products has a positive impact on awareness of ENERGY STAR. This is particularly the case among those who have purchased home appliances. Where 48% of respondents overall are aware of ENERGY STAR on an unaided basis, 59% among those who have purchased home appliances say they are aware of ENERGY STAR. Similarly, where 59% of respondents overall profess awareness of the ENERGY STAR symbol after hearing a description of it, 70% of those who have purchased home appliances claim awareness of the ENERGY STAR symbol.

With respect to awareness of ENERGY STAR financial incentives, those who purchased heating and cooling products are most familiar with financial incentives, while those

who say they purchased home electronics are actually less likely than respondents on average to say they are aware of ENERGY STAR financial incentives.

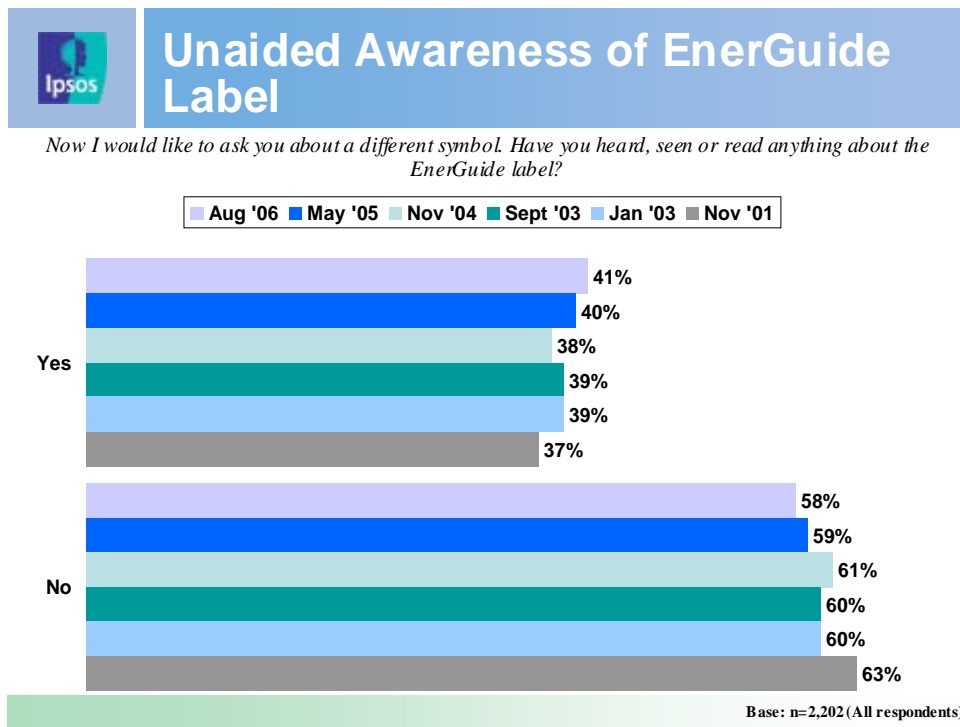
	Aware of E* (Unaided)	Aware of E* Symbol (Aided)	Aware of E* Financial Incentives
All respondents	48%	59%	27%
Purchased home appliances	59%	70%	32%
Purchased home office products	56%	68%	31%
Purchase home electronics	51%	64%	24%
Purchased building materials	55%	67%	32%
Purchased heating and cooling products	54%	67%	36%

"E\*" equals "ENERGY STAR"  
Percent equals "yes."

# Awareness and Understanding of the EnerGuide Label

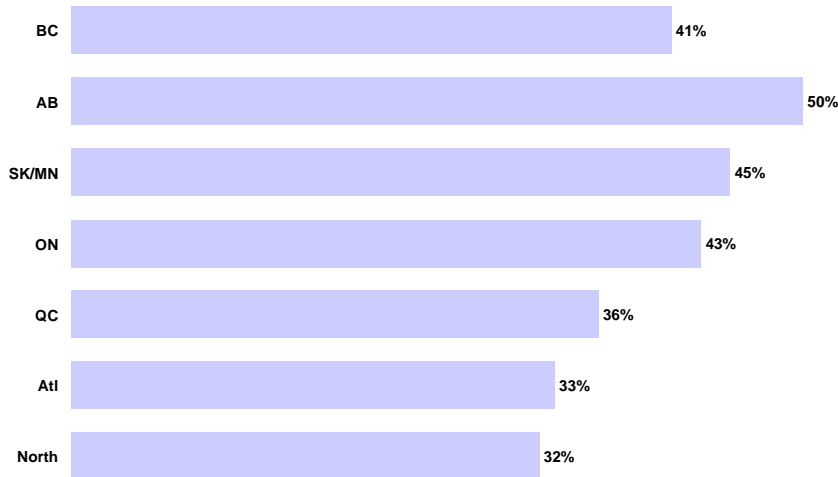
## Unaided Awareness of EnerGuide Label

Respondents were asked if they had heard, read, or seen anything about the EnerGuide label. Unaided awareness of EnerGuide label has remained constant since 2001 (2006: 41%; 2005: 40%; 2004: 38%; Sept 2003: 39%; Jan 2003: 39%; 2001: 37%).



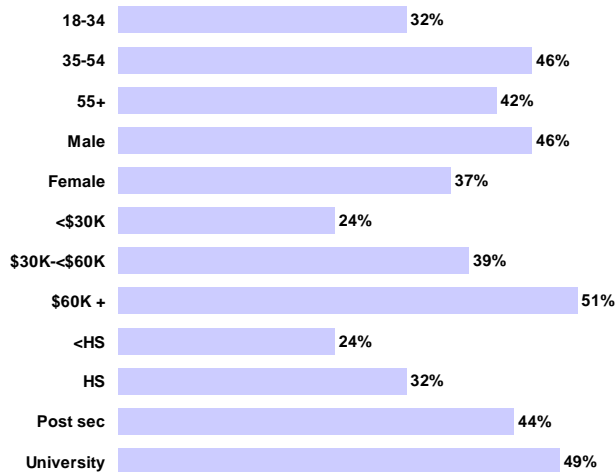
The slides below detail how unaided awareness of the EnerGuide label varies across key regional and demographic subgroups.

**Ipsos** Unaided Awareness of EnerGuide Label- Region (% Yes)



Base: n=2,202 (All respondents)

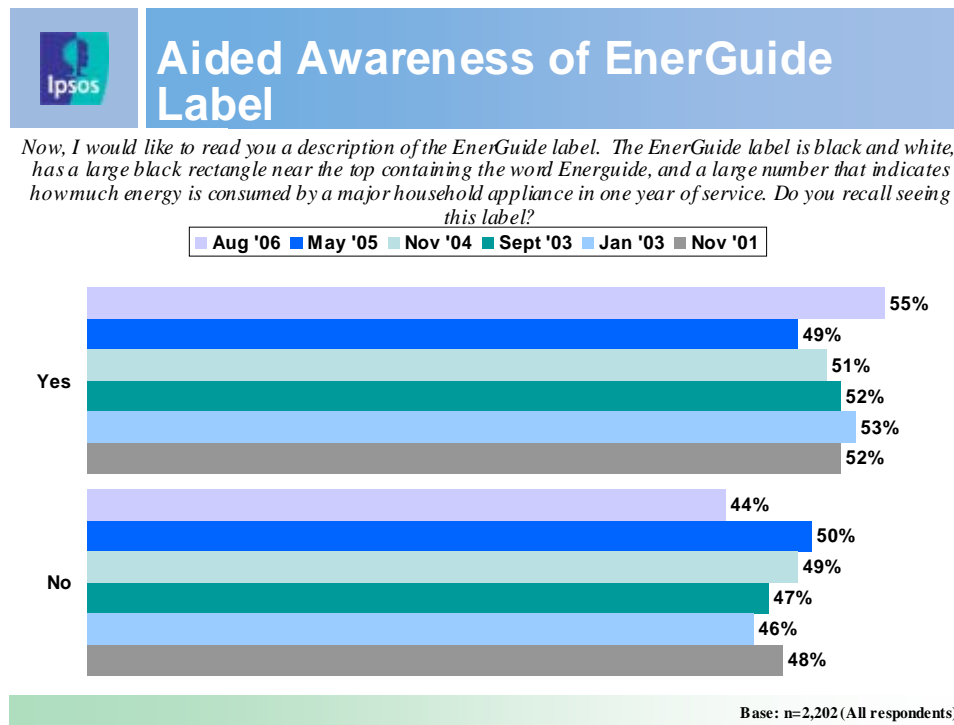
**Ipsos** Unaided Awareness of EnerGuide Label - Demographics (% Yes)



Base: n=2,202 (All respondents)

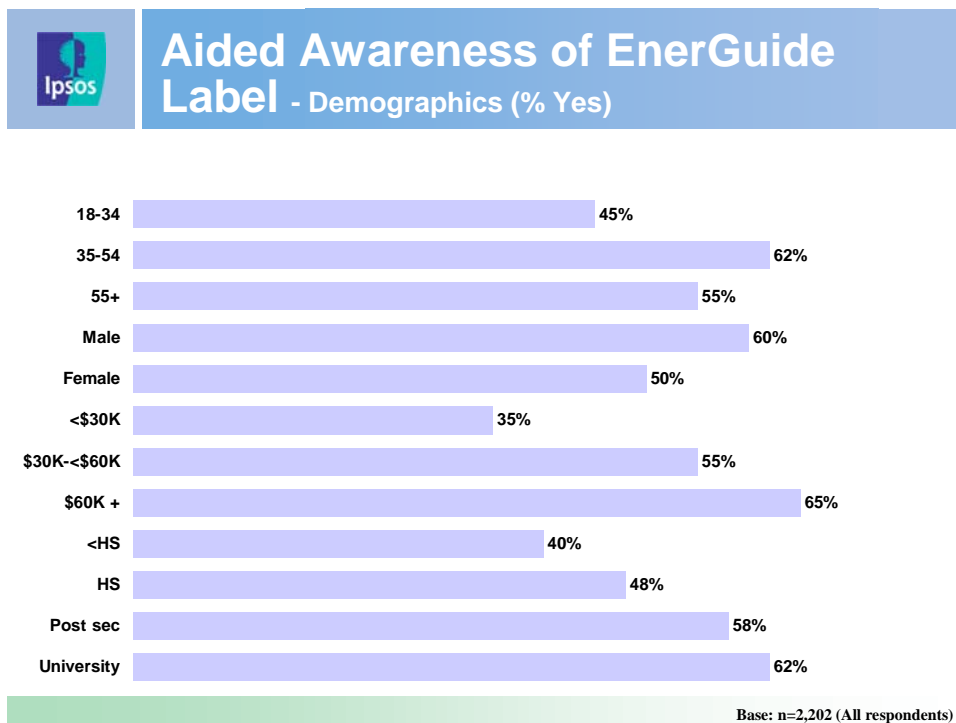
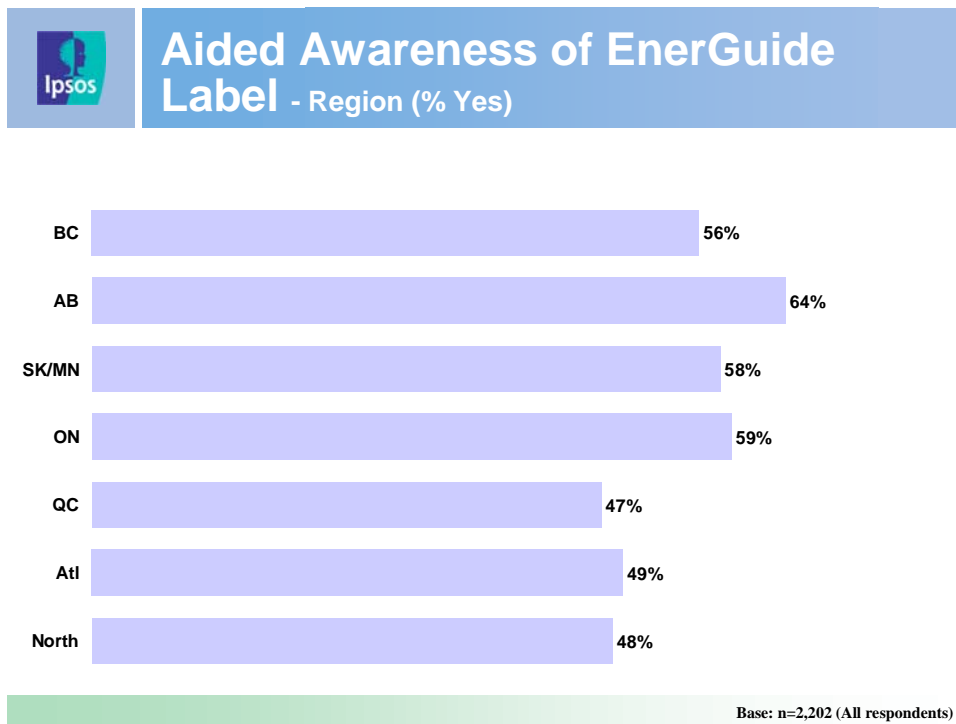
### Aided Awareness of EnerGuide Label

When respondents were read a description of the EnerGuide label, just over half (55%) say they are aware of the label. This finding represents a slight improvement over the findings of earlier years (May 2005: 49%; Nov 2004: 51%; Sept 2003: 52%; Jan 2003: 53%, 2001: 52%)



Those who intend to purchase a major household appliance over the next year are somewhat more likely than average to say they are aware of the EnerGuide label (62% vs. 55%). Those who say they have purchased a home appliance (68%) or building materials (69%) within the past year are much more likely to profess awareness of the label, while those who purchased home electronics (58%) are less impacted.

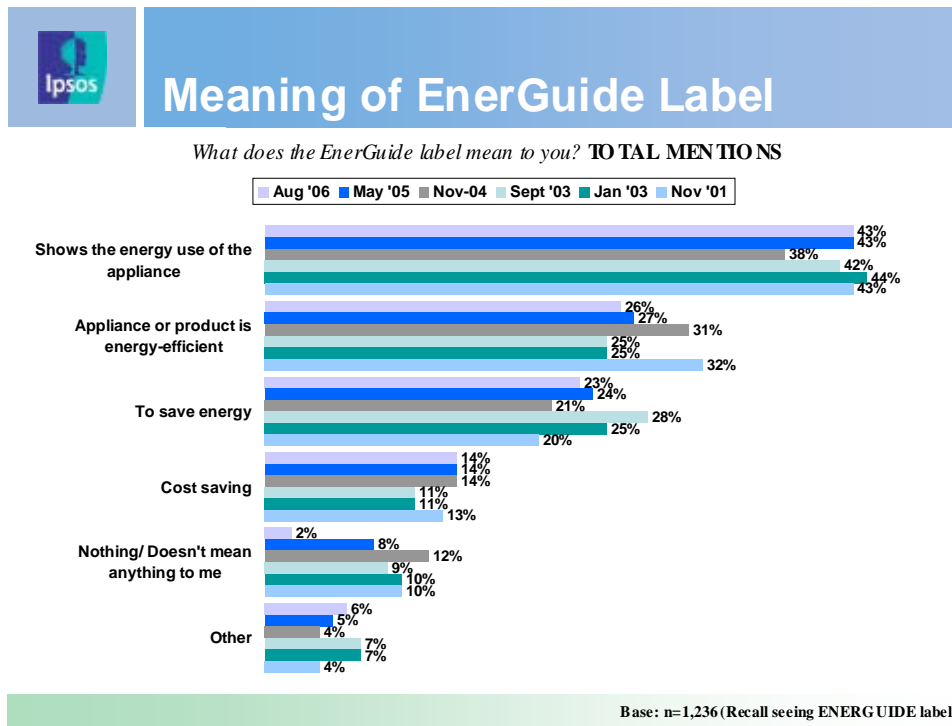
The slides below detail variation in aided awareness of the EnerGuide label across key regional and demographic subgroups.



### Meaning of EnerGuide Label

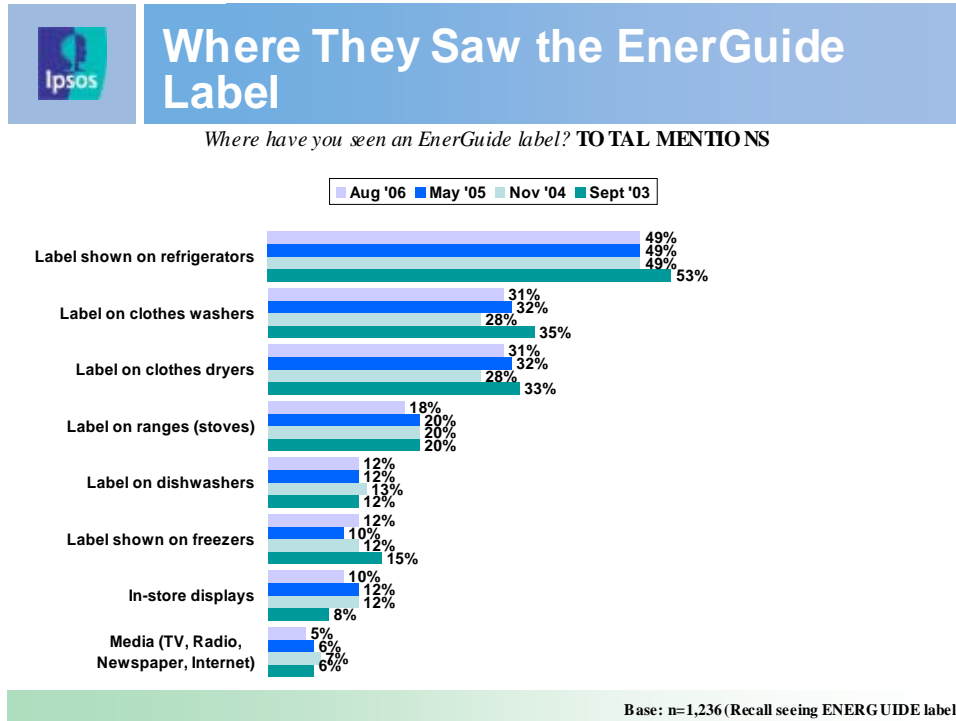
When asked what the EnerGuide label meant to them, respondents aware of the label most commonly said that it showed the energy use of the appliance (43%). Others mention that the label means the appliance or product in question is energy efficient (26%) or that it saves energy (23%). Cost savings (14%) are also mentioned by more than one in ten respondents.

While the proportions who mention these meanings have shifted over different waves, the different meanings have remained in the same order since November 2001.



### Where They Saw The EnerGuide Label

Respondents with aided awareness of the EnerGuide label were asked where they had seen it. Respondents most frequently mentioned labels shown on refrigerators (49%), labels shown on clothes washers or dryers (31% each).<sup>10</sup> Others mention seeing the label on stove ranges (18%), dishwashers (12%), in-store displays (12%) or freezers (10%).



<sup>10</sup> Numbers based on total mentions. Accepted up to three responses