

ENERGY STAR[®] Survey 2001: Implications for the ENERGY STAR Program and Program Partners

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ABSTRACT

In Fall 2001, the Consortium for Energy Efficiency (CEE) fielded the second national survey to gauge household recognition of the ENERGY STAR label. Modifications to the 2001 survey included improved mail survey design, minor changes to the survey instrument, and the addition of a separate webTV-based survey to allow formal comparison between survey modes.

This paper provides data on key parameters between survey years 2000 and 2001 and between modes, as well as 2001 findings regarding sources cited for consumer exposure to the label and sources consulted in making purchasing decisions for energy-using products. The findings show that the efforts of regional energy efficiency program sponsor (REPS) partners are having an impact on ENERGY STAR label recognition, understanding, and influence. Respondents living in areas with high levels of REPS partners' promotions are noticing ENERGY STAR television advertising, direct mail, utility inserts, and in-store point-of-purchase displays. However, there continues to be a disconnect between where respondents report hearing about or seeing the label and where they say they seek information when researching products. The new data show no change in recognition or understanding of the ENERGY STAR label since the 2000 survey; possible reasons for and implications of this finding are addressed.

Introduction

In summer 2000, the Consortium for Energy Efficiency (CEE) sponsored the first nationally coordinated survey of household recognition of the ENERGY STAR label (Goldberg, Rosenberg & Pettit 2001). This mail survey was designed to assess recognition, understanding, and use of the ENERGY STAR label at a national level; to allow CEE's sponsoring members to field the survey simultaneously in their service territories; and to allow comparison of areas of high and low publicity activity by ENERGY STAR regional energy efficiency program sponsor (REPS) partners. (REPS partners include utilities, states, and other administrators of publicly funded energy efficiency programs.)

While the 2000 survey successfully established national values for ENERGY STAR recognition, understanding, and use, low response rates raised concerns about nonresponse bias (Goldberg et al. 2001). To address these concerns, CEE's evaluation committee recommended that a webTV survey be considered as an alternative to a mail survey. Building on this suggestion for the 2001 survey, CEE simultaneously fielded a mail survey and webTV survey to serve as a bridge between data collection methods for future years and to allow for comparison of data over time. A full analysis of the national data is being completed by Xenergy, Inc. It is anticipated that a full report will be available for downloading from CEE's web site at www.cee1.org by August 2002.

This paper provides initial findings from the 2001 survey.¹ In addition, key parameters are compared between areas of high and low publicity activity, between years, and between modes. The authors hope these findings will stimulate dialogue to inform future program and evaluation design.

Methodology

In order to allow the ENERGY STAR survey to transition from a mail survey to one fielded via webTV without abandoning the data gathered by mail in 2000, CEE chose to field the 2001 survey as a mixed-mode survey. With the mixed-mode design, one national sample of households received paper questionnaires by mail, while another national sample received electronic questionnaires via webTV. The two questionnaires were fielded simultaneously.

Instrument Design

The questions asked in 2001 were very similar to those asked in 2000. In an effort to boost response rates to the mail survey in 2001, the CEE survey subcommittee redesigned the mail instrument and specified a modified Dillman approach (Dillman 2000) to fielding the mail survey. The webTV survey instrument was designed to follow the mail survey instrument as closely as possible.

The 2000 mail survey measured “aided” awareness or “aided” recognition (Tannenbaum & Feldman 2001) of the ENERGY STAR label by showing the label and asking respondents “Before this survey, had you ever seen or heard of this label?” The 2001 mail and webTV surveys both asked aided recognition in this way. The webTV version also included a question about “unaided” recognition.

Sampling

The 2001 mail and webTV surveys were both fielded to national samples. The base frame for each of these samples was all households in the 56 largest Nielsen Designated Marketing Areas (DMAs). These DMAs account for approximately 70 percent of all U.S. households. In addition, a few CEE survey sponsors also sponsored simultaneous oversamples for their states or service territories. Both the mail and webTV samples were stratified random samples.

Mail. The mail sample was stratified by DMA and CEE sponsor area oversample. Each DMA was assigned to one of three categories of message saturation or publicity, “high publicity,”² “low publicity,”³ or “other.”⁴ Within each category, the sample points were

¹ The results presented in this paper are based on preliminary analysis of the 2001 survey. The parameter estimates in the final report are not expected to vary from those presented here. However, a simplified calculation has been used to develop the tests of statistical significance presented in this paper. Correct standard errors that may be used for accurate statistical tests are included in the full report.

² Areas in which utilities or other organizations based a publicity or rebate program on the ENERGY STAR label, and this effort included a minimum degree of promotion for at least two years.

³ Areas with no other ENERGY STAR promotions beyond the national-level efforts conducted by the EPA/DOE.

allocated among the DMAs assigned that category in proportion to the number of households in the DMA. For each stratum, whether a DMA or CEE sponsor area, a simple random sample was taken from all households in that area.

WebTV. The webTV sample was stratified by publicity category and CEE sponsor area oversample. DMAs in the base frame that were not in the CEE sponsor area were assigned to one of the three publicity categories. However, individual DMAs were not distinct sampling strata. Each publicity stratum was the collection of all households in all DMAs assigned to that publicity category.

The webTV sample was drawn from an existing panel of households that had been randomly selected and recruited via telephone by the webTV research firm, Knowledge Networks, Inc. The presence or absence of a computer or Internet service in the contacted household, or the ability to pay for these or use them, is not a factor in recruiting households for participation in the panel. (For details on the recruitment process and panel recruitment rate, see Clinton [2000]). Consequently, the data gathered via webTV can be generalized to U.S. households with quantifiable accuracy.

Survey Fielding

The mail survey was sent in two waves, the first to all the households in the sample and the second to households that had not yet responded to the survey, with a reminder postcard mailed in between. The method by which the survey was fielded varied somewhat by sponsor oversample. In an effort to reduce response bias, all the households in the national sample and some households in the oversamples received the survey almost blind (i.e., in an envelope bearing the return address of the mail research firm, SRBI, with no explicit mention of CEE anywhere on the mailing or in the cover letter), and with the second mailing, an offer of a \$5 incentive as either cash or a donation to the Red Cross Disaster Relief Fund. (For details on the different incentives and mailing treatments, see Goldberg et al. [forthcoming].)

Response Rates

Responses to the national mail survey were combined with those of the oversamples; these data were weighted and analyzed together. In aggregate, the mail survey response rate was 26.5 percent; the webTV, 45.3 percent.

Unfortunately, responses to the two waves of the mail survey that were sent out before and after September 11th were not tracked separately, so it is impossible to analyze the effect of September 11th on response rates. However, an analysis of mail survey returns by national sample and sponsor area oversample suggests that the number and timing of returns coming from areas more affected by the events of September 11 were not different enough from returns sent from less affected areas to be a cause for concern. A follow-up telephone survey of 200 non-respondents included a series of five yes/no questions about possible reasons that they did not return the mail survey. The results of the telephone survey gave no indication that the events on and following September 11th (including the anthrax

⁴ Areas in which EPA/DOE's national-level efforts were supplemented by additional targeted media outreach by these organizations.

mail scare) or any of the incentive schemes were involved in their decision not to respond. (For an analysis of other possible sources of bias, see Goldberg et al. [forthcoming].)

Results

The results presented here focus on a number of key questions that are likely to be of particular interest to REPS partners and that were asked in both the 2000 and 2001 surveys. These had to do with aided recognition of the ENERGY STAR label; the degree to which respondents saw the label as influencing their purchases of energy-using products; where respondents heard about or saw the label; and where respondents were most likely to turn for information about energy-using products.

Aided Recognition of the Label

In the 2000 survey, 41 percent of respondents answered “yes” to the aided recognition question “Before this survey, had you ever seen or heard of this label?” after being shown the ENERGY STAR label. In 2001, 40 percent of respondents to the mail survey and 39 percent of respondents to the webTV survey answered “yes” to this question. The difference between responses in 2000 and 2001 is not statistically significant, indicating that public recognition of the label remained steady between the two surveys. This lack of change lends credence to the 2000 results, which suffered from relatively low response rates. (The response rate for the combined national and state-level samples in 2000 was 10.2 percent [Goldberg, Rosenberg & Pettit 2001].)

In the 2001 mail survey, households in regions that were exposed to a high level of publicity recognized the ENERGY STAR label at significantly greater rates than those exposed to a low level (53 percent versus 31 percent, respectively, $p < 0.10$). These results are in accordance with the 2000 data on aided recognition by publicity level (when 52 percent of households in high publicity areas and 37 percent in low publicity areas recognized the label, $p < .0005$), and indicate that publicity and promotional programs by REPS partners affect household recognition of the label.

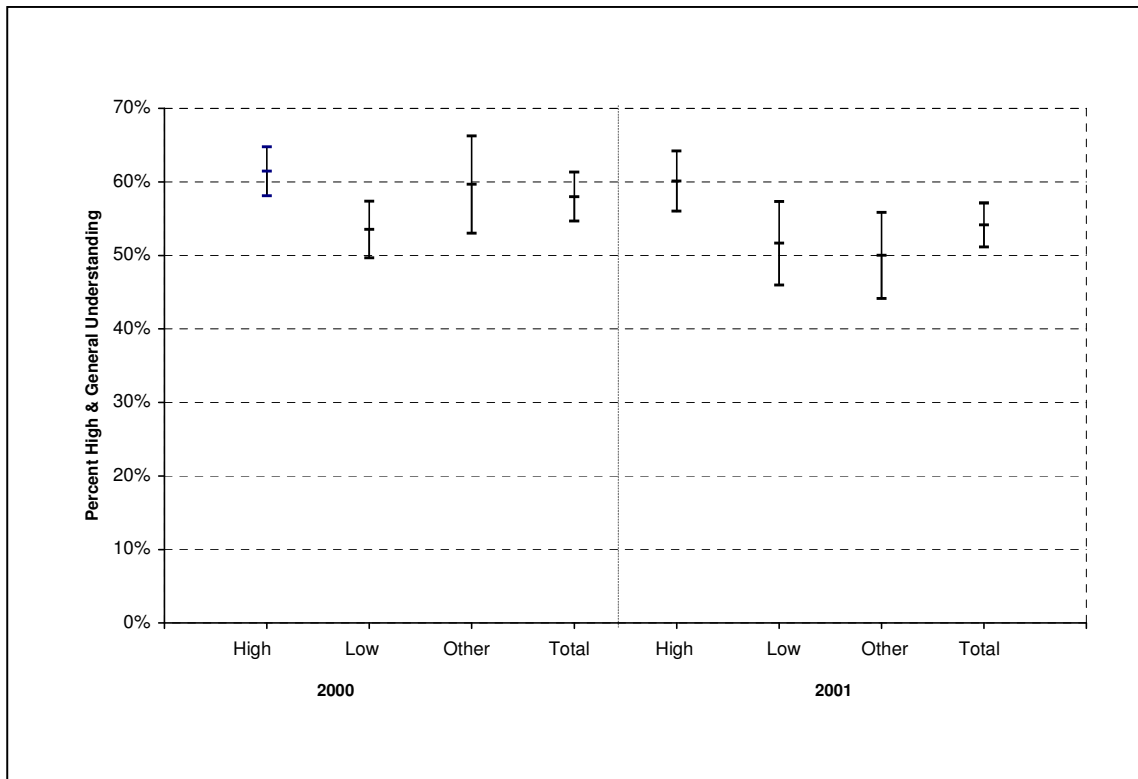
Understanding of the Label

Understanding of the ENERGY STAR label was determined from an open-ended response to a question on the meaning of the label. The 2001 data were coded for understanding into three categories (“high,” “general,” and “none”) using a coding scheme similar to that used for the 2000 survey. (For details on coding of understanding, see Goldberg et al. [forthcoming].)

In 2000, 57 percent of survey respondents exhibited a high or general level of understanding of the ENERGY STAR label. In 2001, 54 percent of the mail survey respondents and 56 percent of the webTV respondents exhibited such understanding. The differences in understanding between the two years and the two survey methods are not statistically significant.

Comparing just those mail survey respondents from the two survey years who exhibited a high or general level of understanding of the label by publicity level (Figure 1), it is clear that publicity level continues to affect the rate at which households understand the

Figure 1. Percent High and General Understanding of the ENERGY STAR Label, 2000 and 2001, Via Mail Survey, by Publicity Level, with 90 Percent Confidence Interval



label (60 percent for high publicity versus 51 percent for low publicity in 2001, $p < 0.10$). Together, Figure 1 and the results of the aided recognition question discussed above show that promotional efforts by REPS partners clearly make a difference. Respondents in areas where there have been high levels of ENERGY STAR publicity are not only more likely to recognize the label, they are also more likely to correctly grasp its meaning.

Self-reported Influence of the Label on Purchasing

In both 2000 and 2001, respondents were asked “For any ENERGY STAR products you purchased, did the presence or absence of the ENERGY STAR label influence your purchasing decision?” In 2000 this was posed as a yes/no question, while in 2001 respondents were asked to choose from five answer categories (“very much,” “somewhat,” “slightly,” “not at all,” and “don’t know”). In 2000, 50 percent of respondents who also reported purchasing an ENERGY STAR-labeled product answered “yes” to this question (Goldberg, Rosenberg & Pettit 2001). In 2001, 54 percent of mail respondents and 50 percent of webTV respondents who also reported purchasing an ENERGY STAR-labeled product answered “very much” or “somewhat,” while 72 percent and 64 percent, respectively, answered “very much,” “somewhat,” or “slightly.” While self-reported data are not quite as reliable as observational data (Weigel 1983), these results indicate that the label is perceived or is reported to influence purchasing decisions. In addition, this perceived influence is greater in high publicity areas, with 38 percent of respondents reporting that the

label influenced them “very much” in high publicity areas versus only 11 percent reporting this in low publicity areas (via mail, $p < .0005$).

Sources of Information Seen and Consulted

The findings discussed above show that the efforts of REPS partners are having an effect on label recognition and understanding, and appear to influence the purchasing of ENERGY STAR-labeled products. Other questions included in the ENERGY STAR surveys can help partners and the EPA in determining where the most impact can be gained from their promotional efforts.

The analysis below focuses on trends emerging from the 2001 mail and webTV data. Where the 2001 survey results vary considerably from the 2000 results, this is noted and discussed. Goldberg et al. (forthcoming) will address many of these areas in greater detail.

In 2001, respondents were asked “Where did you hear or see something about ENERGY STAR?” Table 1 shows the percent of survey respondents by publicity region who reported seeing or hearing about the label via different media in 2001. The results show a striking difference by publicity region between respondents having heard or seen something about ENERGY STAR in a television commercial. The difference is strong and statistically significant for both the mail and webTV surveys (41 percent for high versus 15 percent for low and 46 for high versus 21 percent for low, via mail and webTV, respectively, $p < .005$). By comparison, few respondents reported seeing or hearing about the label as part of a TV news feature story (a total of 4 percent via mail and 3 percent via webTV). (A similar difference between high and low publicity areas was not found in the 2000 survey. However, direct comparison between the years within publicity categories is not meaningful because the same DMA was not necessarily in the same publicity category each year, and because “TV commercials” was not offered as a separate category from “TV news stories” in 2000.) These results suggest that the paid TV advertising sponsored by ENERGY STAR partners in high publicity areas makes a significant difference to the visibility of the campaign on television. Respondents in high publicity areas appear to notice ENERGY STAR advertising, despite the barrage of other TV ad campaigns running.

Table 1 also shows that in 2001, respondents in high publicity areas reported having heard or seen something about ENERGY STAR via utility bill inserts with about one and a half times the frequency of those in low publicity areas (39 percent for high versus 24 percent for low, $p < .005$ for mail; 27 percent for high versus 16 percent for low, $p < .05$ for webTV). While the webTV results are lower than the mail results for this item, the consistency in the differences strongly suggests that the efforts made by REPS partners through utility bill inserts are noticed by respondents in high publicity areas.

The percentage of 2001 respondents citing displays in stores as a place where they saw or heard something about ENERGY STAR also varies by publicity area, with 45 percent of mail survey respondents in high publicity areas citing these displays, versus only 30 percent in low publicity areas.

The results indicate that television advertising, utility bill inserts, and in-store point-of-purchase displays—tactics used by regional programs to spread the word about ENERGY STAR products—are successfully attracting consumer attention in regions where the greatest resources are put behind them. Consumers are more likely to report hearing about or seeing the label through these media in the high publicity areas than in the low publicity areas. This

Table 1. Percent of Survey Respondents Seeing or Hearing Something About ENERGY STAR Via Different Means in 2001, by Publicity Level

Source	Mail			WebTV		
	High	Low	Total	High	Low	Total
	Publicity	Publicity		Publicity	Publicity	
Newspaper or magazine advertisement	40	19 **	31	30	18 *	27
Newspaper or magazine article	14	8	12	15	7	12
TV commercial	41	15 **	29	46	21 **	36
TV news feature story	6	4	4	3	4	3
Radio commercial	9	3 *	5	6	1	4
Billboard	5	1	3	4	2	3
Utility mailing or bill insert	39	24 **	32	27	16 *	23
Direct mail or circular advertisement	12	11	9	9	3	7
Labels on appliances or electronic equipment	68	77	69	62	68	65
Yellow <i>EnergyGuide</i> label	22	21	21	22	13	20
Displays in stores	45	30 **	38	32	25	29
Internet	10	8	11	7	15 *	9
Salesperson	6	2	5	3	2	3
Contractor	1	2	1	2	0	1
Friend, neighbor, relative, or co-worker	4	0 *	3	5	5	4
Other	5	12 *	9	4	5	7

* Differences between high and low publicity groups are significant at p<.05.
** Differences between high and low publicity groups are significant at p<.005.

observation is consistent with trends observed in last year's survey (McNamara & Pettit 2001).

The survey also provides useful information about media and information channels, including where consumers had observed or heard about the ENERGY STAR label and the sources that consumers are likely to consult to obtain product information. While the survey questionnaire was not designed to facilitate direct comparison between where respondents said they had seen or heard about the label and sources they are likely to consult for product information, a review of the results provides useful qualitative marketing insights. Table 2 shows the media via which respondents said they had seen or heard about ENERGY STAR and the information sources they report using to obtain information about (1) home heating and cooling products and (2) home appliances, lighting, and home electronics. Based on a comparison of respondents that recognized the ENERGY STAR label in the 2001 mail survey, there is a notable disconnect in the following media categories: (1) "Advice from a friend, neighbor, relative or co-worker"; (2) "Salesperson or contractor"; (3) "*Consumer Reports* and other product-oriented magazines"; and (4) "Internet." Sixty-three to 65 percent of all respondents consult a friend, neighbor, relative, or co-worker for information on energy-

Table 2. Media Via Which Respondents Saw or Heard About ENERGY STAR and Sources Respondents Use to Obtain Information in 2001 Via Mail, by Percent

Medium	Saw Energy Star Label in this Medium ¹	Consults this Medium for Heating/Cooling Products ²	Consults this Medium for Lights and Appliances ²
Newspaper		37	34
Newspapers/magazines	36		
Newspaper or magazine advertisement	31		
Newspaper or magazine article	12		
<i>Consumer Reports</i> and other product-oriented magazines		53	53
Other types of magazines		13	17
Television	30	33	30
TV commercial	29		
TV news feature story	4		
Radio		14	12
Radio commercial	5		
Billboard	3		
Electric or gas utility		26	19
Utility insert/direct mail	35		
Utility mailing/ or bill insert	32		
Direct mail or circular advertisement	9		
Labels on appliances or electronic equipment	69		
Yellow <i>EnergyGuide</i> label	21		
Displays in stores	38		
Internet	11	37	37
Salesperson/Contractor	5		
Salesperson	5	36	40
Contractor	1	30	21
Friend, neighbor, relative, or co-worker	3	63	65
Other	9	4	4

¹ As percentage of respondents who recognized the ENERGY STAR label.
² As percentage of all respondents.
Percents in **bold** are households that reported one or more of the more specific sources in the rows that follow.

using products, but only 3 percent reported having heard about the label from one of these sources. Respondents report a high degree of reliance on salespersons and contractors as a source of information about heating and cooling products (with 36 percent most likely to obtain information about these products from a salesperson and 30 percent from a contractor) and appliances, lighting and home electronics (with 40 percent most likely to consult a salesperson and 21 percent a contractor). Yet only 5 percent of respondents who recognized

the label had heard about it from a salesperson or contractor. While 53 percent of respondents consult *Consumer Reports* or other product-oriented magazines for product information, only 36 percent of respondents who recognized the label reported having seen it in newspapers or magazines. While 37 percent of respondents use the Internet to find information about energy-using products, only 11 percent reported having seen or heard of the label via this medium.

These data show that consumers were much more likely to consult the channels listed above for information than they were to have seen the ENERGY STAR label through these channels. This observation is consistent with findings from the 2000 survey (McNamara & Pettit 2001). In addition, the 2001 survey asked the following of respondents who reported purchasing an ENERGY STAR-labeled product in the last 12 months: "How likely are you to recommend ENERGY STAR-labeled products to a friend?" Forty-two percent of the purchasing population reported that they were "very likely" and 71 percent reported that they were "somewhat" to "very likely" to recommend ENERGY STAR-labeled products to a friend. These observations suggest that the federal program and REPS partners should develop strategies to (1) increase word of mouth and stimulate peer referrals (e.g., directly appealing to consumers to recommend ENERGY STAR to a friend); (2) reach out to retail sales staff and contractors; (3) provide direct outreach to *Consumer Reports* and other product-oriented magazines; and (4) improve and better focus availability of information about ENERGY STAR on the Internet (e.g., ensure linkages to key Internet search engines, and ensure that ENERGY STAR partners highlight the label on their web sites).

Table 3 shows selected products, product literature, and packaging on which respondents to the 2001 mail survey reported having seen the ENERGY STAR label. Differences by publicity level on this table are consistent with observations from 2000

Table 3. Selected Products/Product Literature/Packaging on which Respondents Saw Label in 2001, Via Mail Survey, by Publicity Level

	High Publicity	Low Publicity	Total
Products frequently promoted by regional programs under the ENERGY STAR label			
Room AC	37	21 **	28
Dishwasher	35	24 *	29
Refrigerator	66	37 **	52
Washing machine	39	25 **	31
Lighting fixture	16	3 **	11
CFL	26	5 **	17
Products <i>not</i> frequently promoted by regional programs under the ENERGY STAR label			
Central AC	30	23	28
Computer or monitor	49	67 **	57
TV	28	28	29
* Differences between high and low publicity groups are significant at p<.05.			
** Differences between high and low publicity groups are significant at p<.005.			

(McNamara & Pettit 2001): products that are heavily promoted by regional programs are more likely to be cited by respondents in high publicity areas than by those in low publicity areas. Products that are not heavily promoted by these programs show no difference, or even a reverse trend. Also consistent with last year's observations, ENERGY STAR computers and monitors, which are promoted strongly by ENERGY STAR manufacturing partners but not by regional programs, show the highest level of association with the ENERGY STAR label.

Conclusions

The findings show that the efforts of REPS partners are having an impact on label recognition, understanding, and purchasing influence.

The 2001 results suggest that the greater frequency of ENERGY STAR television ads in high publicity areas is having an impact: ENERGY STAR television spots are noticed at greater rates by respondents in high publicity areas than those in low publicity areas, despite the background media noise from the many other television ad campaigns running. In addition to television advertising, utility bill inserts and in-store point-of-purchase displays are successfully attracting consumer attention in regions where the greatest resources are put behind them.

The 2001 data also indicate that respondents are most likely to consult sources of information about energy-using products such as friends and neighbors, salespersons and contractors, product-oriented magazines, and the Internet when researching products, but that few respondents learned about ENERGY STAR through these sources. Programs may wish to consider strategies to increase information flow through these channels. Some possibilities include appealing directly to consumers to recommend ENERGY STAR to friends and colleagues; reaching out to retail sales staff and contractors; promoting ENERGY STAR articles to consumer-oriented magazines; ensuring ENERGY STAR is prominently displayed on REPS partner and other influential consumer web sites; and ensuring that the ENERGY STAR web site comes up more frequently in key word searches for key products and related search terms through major search engines.

The data show that the efforts of ENERGY STAR partners to promote particular products via regional programs are paying off. Respondents living in high publicity areas, where such products are the most heavily promoted, are more likely to report having seen an ENERGY STAR label on product packaging, literature, or actual products for these specific items than are respondents living in low publicity areas. These findings confirm the value of local and regional promotion by ENERGY STAR partners in building consumer awareness, understanding, and use of the ENERGY STAR label.

Finally, the 2001 results lend credence to the ENERGY STAR survey data gathered in 2000 and provide a stronger foundation for tracking future changes. The substantial differences in response rates, and some of the differences in instrument design, along with the similarity of the results for the two years, make it difficult to draw strong conclusions about change at this point. However, the similarity of many results between years and between survey modes confirms many of the quantitative relationships suggested in the earlier survey. Responses for the key parameters presented in this paper appear not to vary significantly between the two data collection modes. On the one hand, this suggests that CEE should be able to move toward exclusive use of webTV for ENERGY STAR data collection in future years without compromising the ability to identify trends starting with the 2000 mail

survey data. The limitation of this approach is that the number of panel participants is limited, particularly in some areas where sponsors may want oversamples. As a result, both webTV and mail surveys may have a role in the future.

While the 2001 results lend credence to the data gathered in 2000, the lack of change in household awareness and understanding of the ENERGY STAR label between years deserves attention and exploration. One possible explanation for the lack of change is that the conditions between the two survey years were not particularly favorable ones for promoting rapid change in public awareness of the ENERGY STAR label. First, households are bombarded with many messages, and particularly distracting and serious news broke while the 2001 survey was in the field. It is possible that the intense focus of public attention on these events adversely affected label recognition, and that under less unusual circumstances, label recognition for sample households might have been somewhat higher. Second, during the interval between the two surveys a key component of the national ENERGY STAR program strategy was to support the initiatives of regional programs actively while the new public service campaign—the “Change” campaign—was under development. With the “Change” campaign not yet launched, and the earlier public service advertising (PSA) campaign winding down, it seems unrealistic to expect substantial changes in recognition of the label during this period, at least in areas where there were few or no partner promotional efforts. Third, the 2000 survey might have been biased toward an element of the sample population that was more likely to recognize the label, such as households that are more favorably oriented toward energy conservation. The rather low response rate of the 2000 survey lends credence to this possibility. Since the response rates for the 2001 mail and webTV surveys were considerably higher than for the 2000 survey, such a bias in these samples is less likely. Unfortunately, these surveys lacked a battery of attitudinal questions, so it is impossible to determine whether the 2000 sample was indeed biased in this manner compared to the 2001 samples.

Developing significant change in public awareness will take time, resources, and improved coordination among partners. EPA is addressing the need for greater leverage of partner interests by coordinating national promotions such as the ENERGY STAR “Cool Change” and “Change A Light, Change the World” promotions. It is hoped that these activities will bolster existing regional programs while further engaging areas that are geographically less active in promoting ENERGY STAR.

Since ENERGY STAR is most salient to consumers when they are in the market for energy-using products, and the ENERGY STAR label appears on a wide variety of products, it is difficult to hypothesize a natural trajectory for growth in awareness. The replacement cycles for the product categories covered by the program range from three to 20 years. Computers and electronics are purchased more frequently than products such as central heating and cooling and appliances, so as subsequent years’ data are collected, it may be interesting to look for correlation between awareness and sales statistics for products in these categories.

Since both the 2000 and 2001 results show that there is significantly higher understanding and awareness for ENERGY STAR in areas with strong local partners, one core strategy for increasing national awareness would be to cultivate partnerships in geographically underrepresented areas. Not coincidentally, the areas that most actively promote ENERGY STAR have strong public policies to support energy efficiency programming. A key challenge will be to coordinate and cultivate new regional program

sponsors and to leverage existing relationships with retail and manufacturing partners in these areas.

Given the stage in the lifecycle of the PSA campaign, the relative lack of campaign activity in the low publicity areas after the 2000 survey, and the possibility of bias toward a sample that was more favorably oriented toward energy conservation and efficiency in the 2000 survey and thus more likely to recognize the label, the lack of change in ENERGY STAR recognition and understanding between 2000 and 2001 could be considered as a potentially positive sign. Despite decreased publicity in areas without active partner promotions, competition for consumer attention from many other venues, and the intense national focus on the September 11 terrorist attacks, households continue to recognize and understand the label at levels similar to those in 2000, suggesting that the ENERGY STAR campaign message has staying power.

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