

NIMR

Nexus Market Research, Inc.

Report on the Web TV Survey for the New Hampshire ENERGY STAR[®] Appliances Program

Final Report
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1. Introduction

This document is a summary of a tracking survey conducted on behalf of the New Hampshire investor-owned electric utilities. This survey was first conducted in the fall of 2001 as a New Hampshire oversample of a mail survey simultaneously conducted on the national level on behalf of the Consortium for Energy Efficiency (CEE). In 2002, the survey was changed to a WebTV survey, and fielded by Knowledge Networks, Inc. among a pre-recruited panel of households in the U.S. as a whole (that is, without a New Hampshire oversample). With minor modifications, the WebTV survey was conducted again in the fall of 2003 and 2004; the 2004 survey included a New Hampshire oversample.

This document compares these annual results, and also compares New Hampshire results with national results, with grouped results from areas of the country having high promotional efforts for ENERGY STAR[®]-labeled products, and with current results from eight states (Massachusetts, New York, New Jersey, Pennsylvania, Ohio, Florida, Texas, and California) that had large enough samples to examine separately in 2004, either because they were oversampled or because they are large states with large samples.

Knowledge Networks has a pre-recruited panel of consumers who have agreed to complete occasional surveys in exchange for free Web TV in their homes. Because of an extensive recruiting effort, the panel includes a high percentage of those initially targeted, and recruiting quotas have resulted in a panel composition that is demographically similar to that of the U.S. High cooperation rates, coupled with high rates of recruitment, result in reasonable response rates (effectively 24% for the current survey). Also—unlike telephone surveys—the Web TV format allows respondents to see images (such as the ENERGY STAR logo in the current survey), and—unlike mail surveys—allows complex skip patterns.

Knowledge Networks provided the raw data from this survey to Nexus Market Research (NMR), which conducted the analysis presented here. The EPA has commissioned a separate analysis of the national data in order to track consumer recognition, understanding, and purchasing influence of the ENERGY STAR label, as well as data on messaging, product purchases, and information sources used by consumers in their purchasing decisions. This report is expected to be available in March 2005.

The objectives of this survey are to assess:

- Unaided recognition: whether people remember seeing or hearing of the ENERGY STAR label without a visual representation; this number should be comparable to findings from a telephone survey.
- Aided recognition: whether people remember seeing a visual representation of the ENERGY STAR label—either the original version or the version updated in 2003; this number should be comparable to findings from a mail survey, and is not possible to measure with a telephone survey.
- Awareness and understanding of what the label means.

- Whether respondents have been shopping for key appliances (as well as whether they have bought any), allowing us to correlate awareness with shopping and purchases.
- Source of awareness.

The sample for New Hampshire consists of 100 households selected randomly from all households that had been pre-recruited to Knowledge Networks' New Hampshire Web TV sample. The national sample includes the New Hampshire sample, plus another 1,641 households (1,741 total). The non-New Hampshire national sample was divided into three strata based on the largest Nielsen Designated Market Areas (DMAs) that account for approximately 70% of all U.S. households. These three strata are:

- **High-publicity areas.** Areas in which there has been at least two recent years of sustained ENERGY STAR promotions and publicity from non-federal activities. These areas include DMAs in states with a high degree of utility activity: California, Connecticut, Massachusetts, New Jersey (most of the state), New York, Oregon, Pennsylvania (very small part of the state), Rhode Island, Washington, Wisconsin, and Vermont. These areas account for 949 of the total 1,741 households surveyed in 2004. DMAs in New Hampshire, of course, are also high publicity areas, but they were treated as a separate stratum for purposes of this survey.
- **Low-publicity areas.** Areas in which there have been federal campaign activities only and no significant regional program-sponsored activities.
- **Other.** All other DMAs.

In addition, the over-samples from New York and New Hampshire were categorized into two strata each. In this report, all the strata are weighted proportionally when data for the U.S. as a whole are presented.

In addition to the high publicity areas discussed above, we also compare findings for New Hampshire with those of some individual states: Massachusetts, New York, New Jersey, Pennsylvania, Ohio, Florida, Texas, and California. While most of these states have at least some regions with concentrated ENERGY STAR activity, the level and length of activity differ among them. In this report, Massachusetts, New York, and California are considered "active" ENERGY STAR states while New Jersey, Pennsylvania, Ohio, Florida, Texas are considered "less active" states. This part of the analysis will help illuminate where New Hampshire stands in comparison to other areas. We present these comparisons in separate "b" or "c" tables (e.g. Table 1b).

It should be noted that, at 100 households, the sample size in New Hampshire is smaller than in 2001, when 278 households in the state were sampled. The change in sample size reflects the shift from a mail survey to a WebTV survey as well as the decision to conduct a survey among Knowledge Network's potential sample every three years instead of every year, when Knowledge Network rotates its participants. In order to avoid surveying the same individuals every year, the sample size had to be reduced. While necessary, the change to a smaller sample size has some important implications. First, seemingly large percentage differences between New Hampshire and the nation, other high publicity areas, or individual states sometimes fail to prove statistically significant (see Table 5d below for a good example). Second, although we

highlight some of the differences below, comparisons with the previous results must be made with caution because at least some of the findings could be artifacts of the change in survey methodology and not necessarily a change in ENERGY STAR recognition, purchasing behavior, or loyalty.

The questionnaire used for this survey appears as an appendix to this report. In addition, below are examples of the ENERGY STAR and Energy Guide labels; note that the ENERGY STAR label can appear in several different formats.



Based on standard U.S. Government tests

ENERGYGUIDE

Refrigerator-Freezer
With Automatic Defrost
With Side-Mounted Freezer
Without Through-the-Door-Ice Service

XYZ Corporation
Model ABC-W
Capacity: 23 Cubic Feet

Compare the Energy Use of this Refrigerator with Others before You Buy.

This Model Uses 776 kWh/year		
Energy Use (kWh/year) range of all similar models		
Uses Least Energy 742		Uses Most Energy 836

kWh/year (kilowatt-hours per year) is a measure of energy (electricity) use. Your utility company uses it to compute your bill. Only models with 22.5 to 24.4 cubic feet and the above features are used in this scale.

Refrigerators using more energy cost more to operate.
This model's estimated yearly operating cost is:

\$68

Based on a 1992 U.S. Government national average cost of 8.24¢ per kWh for electricity. Your actual operating cost will vary depending on your local utility rates and your use of the product.

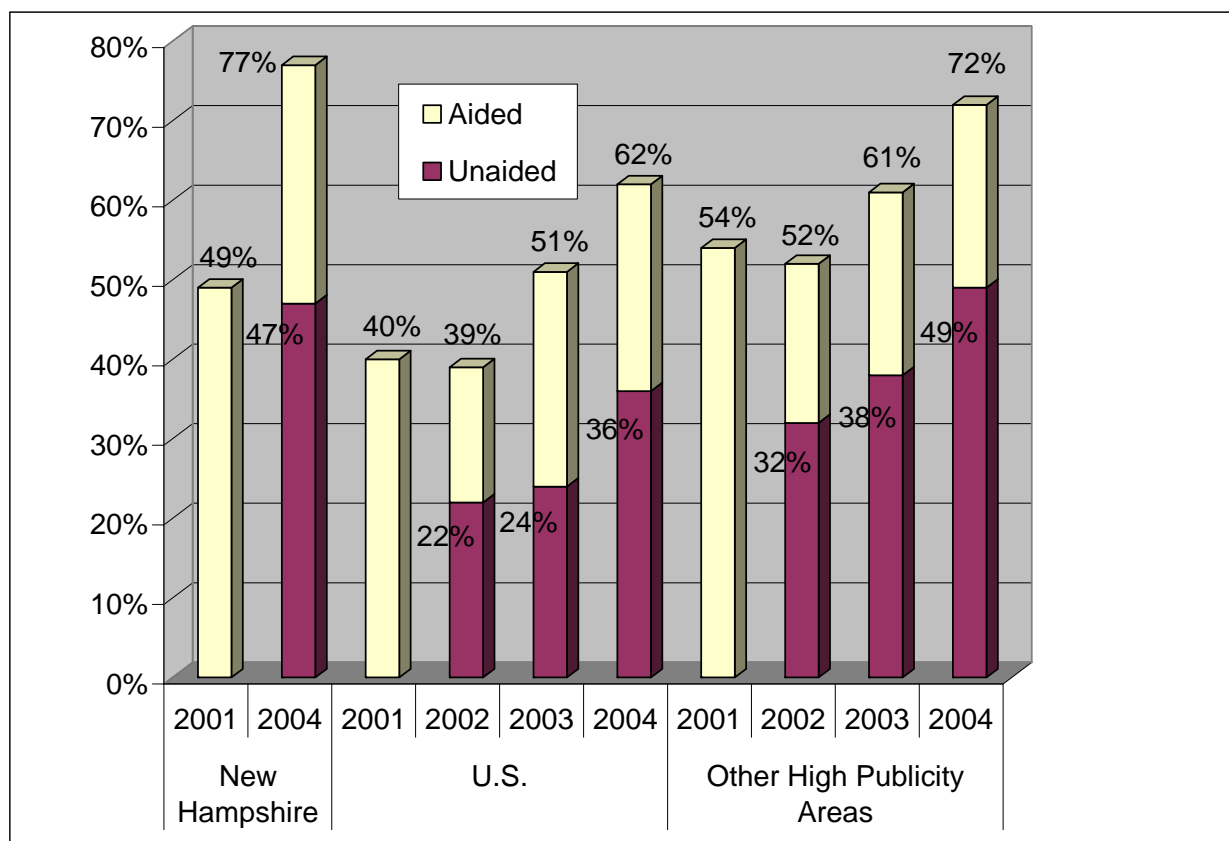
Important: Removal of this label before consumer purchase is a violation of Federal law (42 U.S.C. 6300).

2. Summary

The primary findings of this survey are as follows:

- Recognition.** Aided recognition in New Hampshire in 2004 is 77% - significantly higher than the 49% in 2001 and higher than both the U.S. and other high publicity states (Figure 1). Unaided recognition in New Hampshire is 47%, higher than the 36% for the nation as a whole and about equal to other high publicity areas (49%). Unaided recognition in New Hampshire is only eclipsed by Massachusetts, New York, and California, while aided recognition in New Hampshire is only equaled by California.

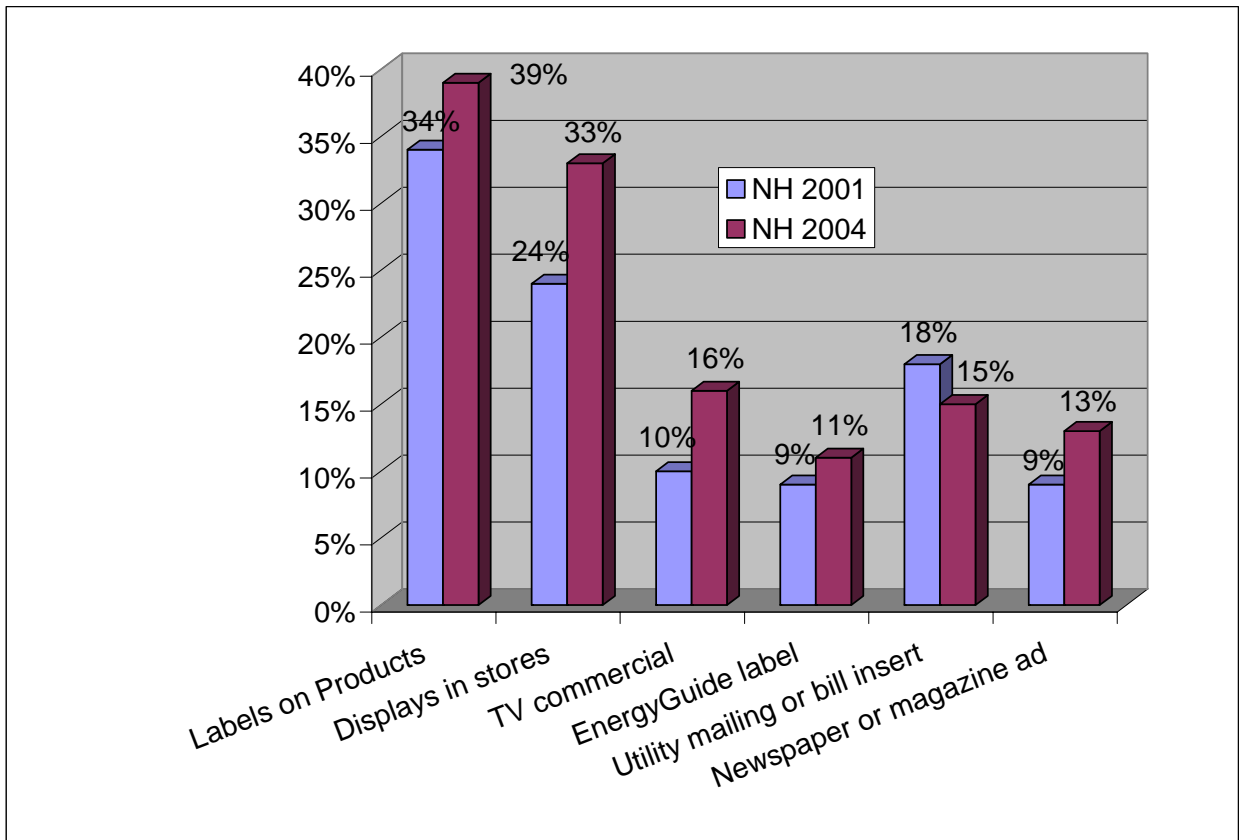
Figure 1: Aided and Unaided Awareness of the ENERGY STAR label



- Source of Recognition.** Asked where they have seen the ENERGY STAR label, New Hampshire respondents most often say on appliances or electronic equipment (39%). This is slightly higher than in 2001 (Figure 2) and the U.S. as a whole, but similar to other high publicity areas and several active states, including Massachusetts, New York, and California. New Hampshire respondents also often say they have seen the label on displays in stores (33%), TV commercials (16%), utility mailings or bill inserts (15%), or newspaper/magazine ads (13%). New Hampshire respondents are significantly likelier than those in the U.S. as a whole and other high publicity regions to have learned of the

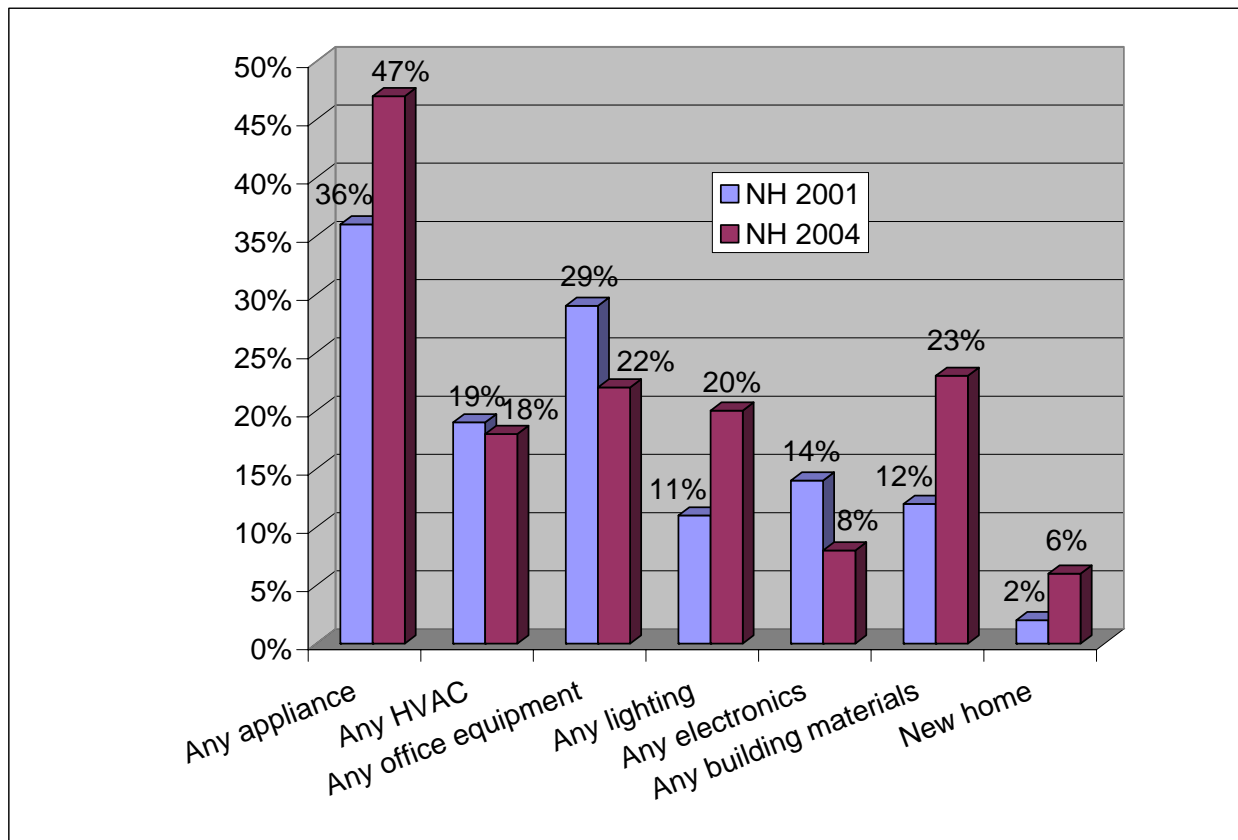
label from appliances or electronic equipment, store displays, and word of mouth. Also note that significantly more NH respondents cited store displays in 2004 than in 2001. These findings regarding appliances/equipment and store displays may reflect the effect of programs in New Hampshire, which utilize both avenues to promote ENERGY STAR products.

Figure 2: Primary Sources of Recognition of the ENERGY STAR label, New Hampshire



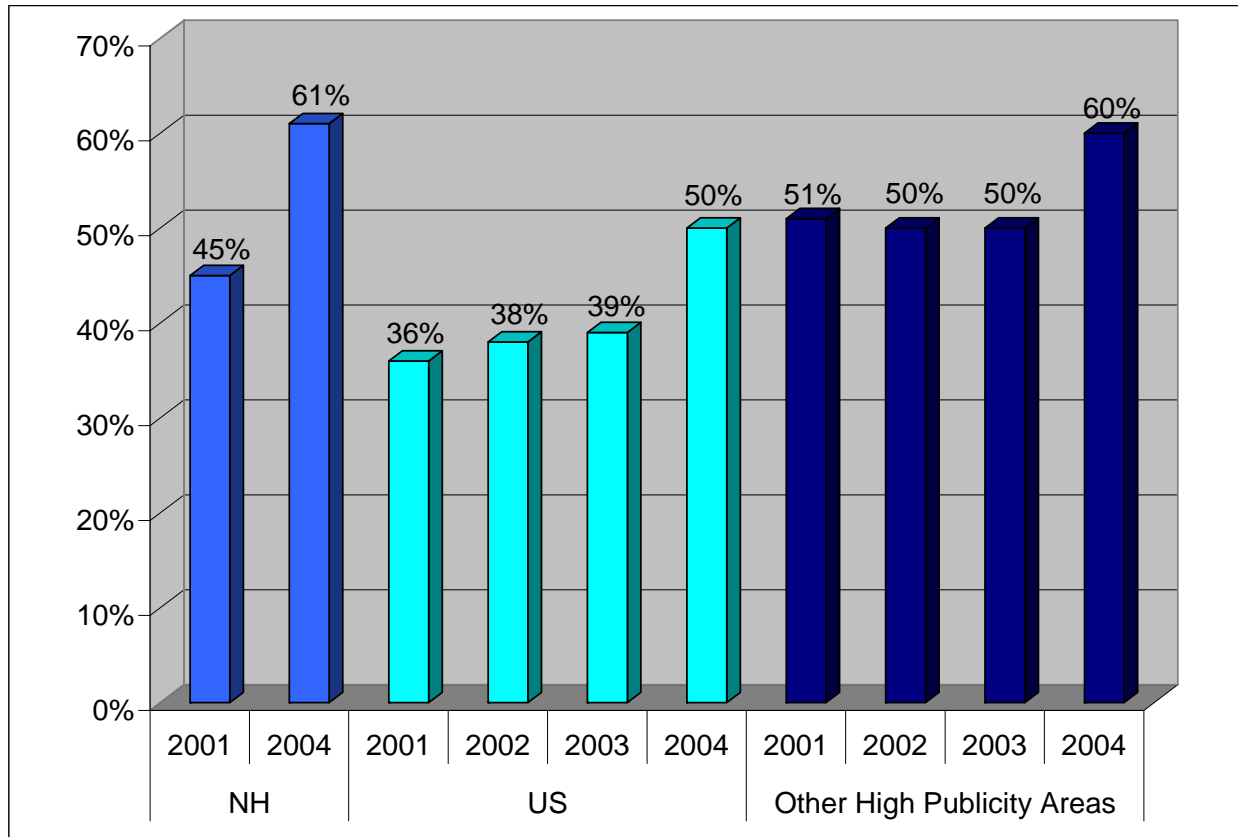
- Associations by Product Type.** New Hampshire residents are by far most likely to recall seeing the label on home appliances (47%) compared to other product types (Figure 3). Compared to 2001, a significantly greater number of New Hampshire residents have seen the label on home appliances, lighting products, and building materials. In terms of specific products, significantly more NH respondents saw the label on: dishwashers, refrigerators, washing machines, microwave ovens, windows, and doors.

Figure 3: Percent of New Hampshire Respondents who have seen the ENERGY STAR label by Product Type



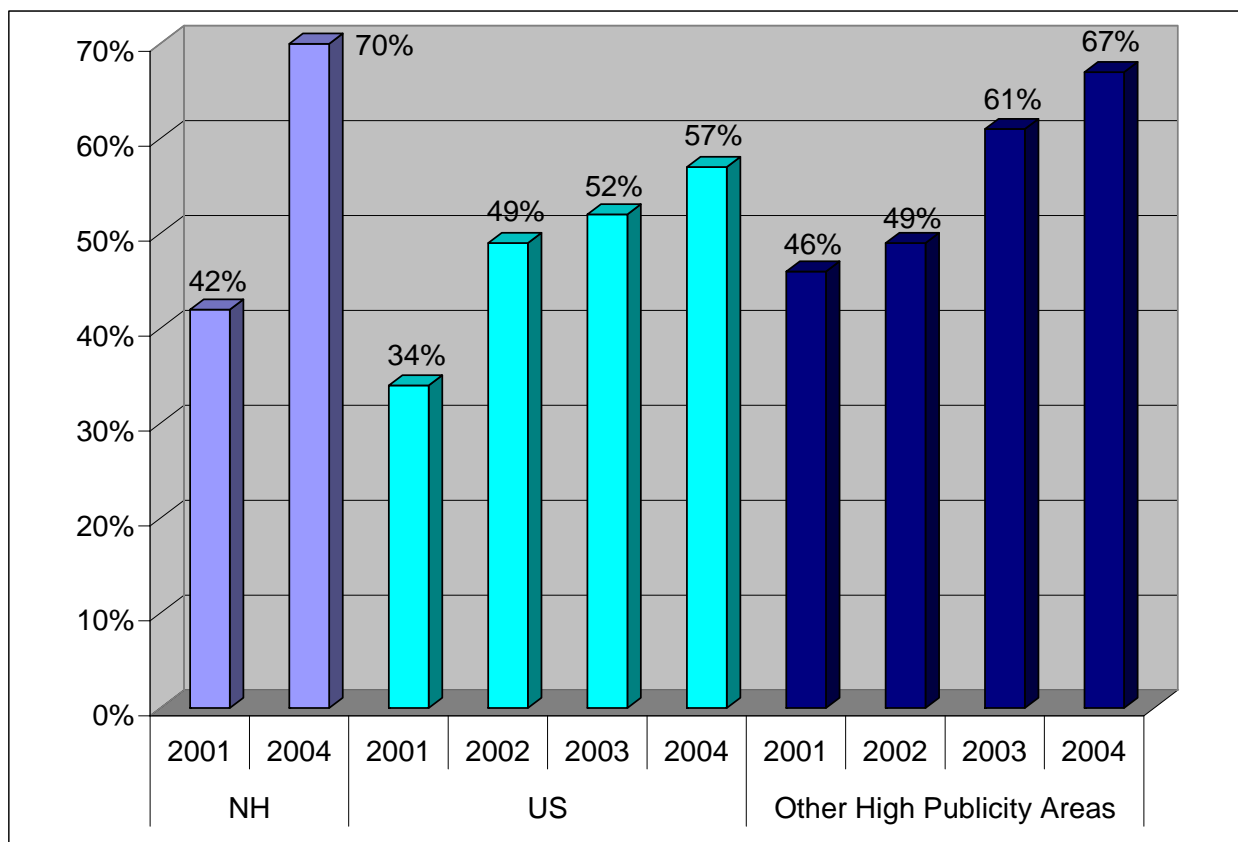
- Overall Product Associations.** Overall, New Hampshire residents are significantly more likely than those in the U.S. as a whole to have seen the label on at least one product (Figure 4). People in New Hampshire are significantly likelier than those in the U.S. as a whole to recall seeing the label on refrigerators, clothes washers, and windows. These differences can be explained by promotions or product prevalence: product associations are higher where New Hampshire has programs promoting ENERGY STAR-labeled products, including appliances and lighting products.

Figure 4: Percent of Respondents who have seen the ENERGY STAR label on any Product



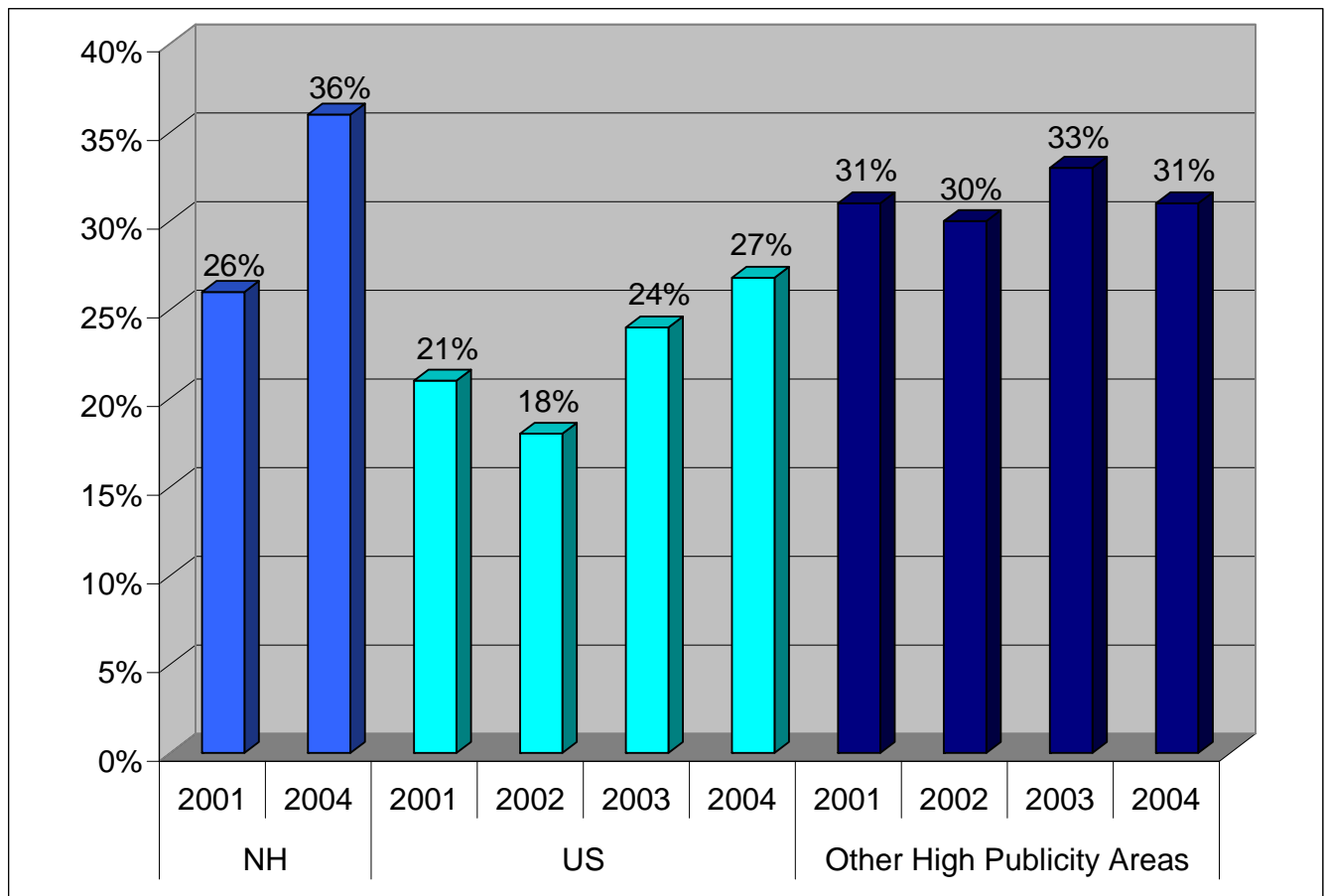
- Understanding.** Understanding of the ENERGY STAR label in New Hampshire has significantly increased in 2004 compared to 2001; 70% of New Hampshire residents now demonstrate a high understanding of the label, up from 42% (Figure 5). New Hampshire respondents are significantly more likely than respondents in the U.S. as a whole to show a high understanding of the ENERGY STAR label, and significantly less likely to show no understanding. New Hampshire respondents also report higher understanding than those in other high publicity areas, though not significantly so. Importantly, of the states considered, only Californians reported higher understanding of the ENERGY STAR label.

Figure 5: Percent of Respondents with High Understanding of the ENERGY STAR label



- Product Purchases.** Compared to 2001, New Hampshire residents are now (2004) significantly more likely to have purchased a dishwasher, light bulb, microwave oven, and window with the ENERGY STAR label (Figure 6). People in New Hampshire are significantly more likely than those in the U.S. as a whole to have purchased all appliances as a group. The net effect is that people in New Hampshire are more likely, though not significantly so, to recall seeing the label on their newly purchased products than are people in the country as a whole and those in high publicity regions.

Figure 6: Percent of Respondents who have seen the ENERGY STAR label on any Product Purchased



- Influence of the ENERGY STAR Label.** Compared to 2001, a higher proportion of 2004 New Hampshire respondents (16% vs. 14%) said the ENERGY STAR label very much or somewhat influenced their purchase, though the difference is not significant. However, the percentage of New Hampshire consumers who say that the label very much or somewhat influenced their decision to purchase a product is significantly higher than in the U.S. as a whole. There are, though, no sizable differences between New Hampshire and other high publicity areas.

- **Rebates for ENERGY STAR Products.** At 6%, New Hampshire consumers of ENERGY STAR-labeled products are more likely to report receiving rebates for their ENERGY STAR-labeled products than are consumers in the U.S. as a whole and similar to those in other high publicity areas.
- **Likelihood of Purchase without Rebate.** Those respondents who reported receiving rebates were asked if they would have purchased the ENERGY STAR product without the rebates. Though the sample sizes are very small for New Hampshire, the percentage of respondents who said they were somewhat likely or very likely to have purchased without a rebate was significantly lower in 2004 than in 2001. In addition, New Hampshire respondents in 2004 were less likely to purchase without a rebate than those in the U.S. as a whole, High Publicity areas, and several of the comparison states.
- **Loyalty to ENERGY STAR.** Loyalty to ENERGY STAR, expressed as likelihood to recommend it to a friend, has not changed among New Hampshire consumers since 2001 (16%). Among New Hampshire consumers who have bought an ENERGY STAR-labeled product, loyalty is not significantly higher or lower than among people in other areas who have bought such products.
- **Sources of Information.** The Web TV survey asked respondents where they would look for information about heating and cooling products as well as for home appliances, lighting, and home electronics. When searching for information on these products, New Hampshire residents primarily rely on advice from friends/neighbors/relatives/coworkers (50% or higher), advice from salespeople, Consumer magazines, and the Internet.
- **Attitudes toward ENERGY STAR Products.** When given a list of statements concerning ENERGY STAR products, New Hampshire residents generally agreed with the expected response for the statement (i.e., agreed with a positive statement regarding ENERGY STAR products or disagreed with a negative statement). Compared to the U.S. as a whole and other high publicity regions, significantly more New Hampshire residents agreed that ENERGY STAR products cost less to use and are better for the environment than are standard products. In addition, significantly more New Hampshire residents than U.S. residents agreed that ENERGY STAR products meet energy efficiency guidelines.

3. Recognition

Following the analysis done for the EPA in the national survey, unaided recognition of the ENERGY STAR label is based on two questions:

- 1) Whether respondents say they have ever seen or heard of the ENERGY STAR label, and
- 2) When the label is presented visually, both in its original version and the version recently updated, verification that this is the label they were thinking of.

Aided recognition is based on whether respondents recall seeing or hearing anything about the label once they see it.

As shown in Tables 1a and 1b, aided recognition in New Hampshire is 77% - significantly higher than the 49% in 2001 and higher than both the U.S. and other high publicity states. Unaided recognition in New Hampshire is 47%, higher than the 36% for the nation as a whole and about equal to other high publicity areas (49%). Note that unaided recognition is not available for 2001 because mail surveys only allow for testing of aided awareness. Unaided recognition in New Hampshire is only eclipsed by Massachusetts, New York, and California, while aided recognition in New Hampshire is only equaled by California.

Table 1a
Unaided and Aided Recognition
(Base=All Respondents)

		n	Unaided	Aided
U.S.	2001	1997	n/a	40%*
	2002	1168	22%	39%
	2003	2676	24%	51% [†]
	2004	1741	36%* [∞]	62%* [∞]
Other High Publicity Areas	2001	1256	n/a	54%
	2002	580	32%	52%
	2003	908	38%	61%
	2004	949	49%	72%
New Hampshire	2001	278	n/a	49%
	2004	100	47%	77% [◊]

*Significantly different from the New Hampshire sample at the 90% confidence level.

◊Significantly different from 2001 at the 90% confidence level.

[†]Significantly different from 2002 at the 90% confidence level.

[∞]Significantly different from 2003 at the 90% confidence level.

Table 1b
Unaided and Aided Recognition, Selected States
(Base=All Respondents, 2004 only)

	n	Unaided	Aided
U.S.	1741	36%	62%
Other High Publicity Areas	580	49%	72%
New Hampshire	100	47%	77%
Massachusetts	107	54%	74%
New York	508	53%	75%
New Jersey	53	28%*	52%*
Pennsylvania	50	35%	57%*
Ohio	57	27%*	55%*
Florida	94	12%*	39%*
Texas	70	34%*	65%*
California	190	53%	77%

*Significantly different from the New Hampshire sample at the 90% confidence level.

Table 1c also shows demographic differences in recognition within the New Hampshire sample. Note that, due to low sample sizes in several demographic segments, awareness levels that are substantially different from the overall New Hampshire results may not in fact result in a statistically significant difference.

It appears that people over 65 and under 25 are least likely of all age groups to recognize the ENERGY STAR label, and that those who are 25 to 34 are most likely to recognize it; chances are that the former groups have slowed down (or not yet made) their purchases of products that are likely to have the label, and the latter are in a life stage in which they make many household purchases. Likewise, the significantly lower rates of aided recognition among those with lower household incomes (below \$50k) may reflect their relatively lower likelihood to purchase the often higher priced ENERGY STAR products. Lastly, higher education reveals a trend of both higher unaided and aided awareness of the ENERGY STAR label.

Table 1c
Unaided and Aided Recognition by Demographics
(Base=New Hampshire 2004 only)

	n	Unaided	Aided
New Hampshire	100	47%	77%
Age			
18-24	9	39%	66%
25-34	9	87%*	100%*
35-44	22	33%	76%
45-54	28	54%	79%
55-64	16	79%*	91%
65 or over	16	19%*	57%
Education			
Less than HS	5	16%	64%
Graduated HS	23	38%	71%
Some college	39	53%	71%
College grad	22	62%	93%*
Grad or prof. degree	11	66%	93%*
Gender			
Male	54	49%	66%
Female	46	45%	86%
Household Size			
1	19	57%	77%
2	32	55%	73%
3	18	33%	94%*
4	14	48%	80%
5 or more	17	32%	64%
Household Income			
Under \$15K	7	69%	69%
\$15-25K	14	25%*	49%*
\$25-35K	6	25%	73%
\$35-50K	25	36%	61%
\$50-75K	26	65%*	88%
75-99K	12	58%	95%*
\$100K+	5	30%	100%*
Own/Rent Status			
Own	71	50%	78%
Rent	26	43%	70%

*Significantly different from New Hampshire as a whole at the 90% confidence level.

Asked where they have seen the ENERGY STAR label, New Hampshire respondents most often say on appliances or electronic equipment (39%; see Table 2a, Table 2b, and Figure 7). This is slightly higher than in 2001 and the U.S. as a whole, but similar to other high publicity areas and several active states, including Massachusetts, New York, and California. New Hampshire respondents also often say they have seen the label on displays in stores (33%), TV commercials (16%), utility mailings or bill inserts (15%), or newspaper/magazine ads (13%).

New Hampshire respondents are significantly likelier than those in the U.S. as a whole, and other high publicity regions to have learned of the label from appliances or electronic equipment, store displays, and word of mouth. Also note that significantly more NH respondents cited store displays (33%) in 2004 than in 2001. These findings regarding appliances/equipment and store displays may reflect the effect of programs in New Hampshire, which utilize both avenues to promote ENERGY STAR products.

Table 2a
Source of Recognition
(Base=All Respondents)

Source	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	278	100	1997	1168	2676	1741	1256	580	908	949
Labels on appliances or electronic equipment	34%	39%	26%*	19% [◇]	25% [†]	29%* [∞]	35%	24% [◇]	35% [†]	38%
Displays in stores	24%	33% [◇]	14%*	14%	15%	23%* [∞]	23%	22%	25%	32% [∞]
TV commercial	10%	16%	11%	11%	11%	14% [∞]	22%*	21%	19%	22%
Yellow <i>EnergyGuide</i> label	9%	11%	8%	7%	8%	9%	12%	7% [◇]	11% [†]	13%
Utility mailing or bill insert	18%	15%	12%*	6% [◇]	11% [†]	11%	20%	13% [◇]	19% [†]	17%
Newspaper or magazine ad	9%	13%	12%	7% [◇]	7%	8%	21%*	8% [◇]	11% [†]	40%* [∞]
Salesperson	2%	3%	2%	3% [◇]	3%	3%	3%	3%	4%	5%
Radio commercial	3%	3%	2%	2%	1% [†]	2% [∞]	5%*	6%	2% [†]	5% [∞]
Newspaper or magazine article	4%	8%	4%	2% [◇]	2%	4% [∞]	8%*	3% [◇]	4%	7% [∞]
Direct mail or circular ad	3%	7%	4%	1% [◇]	2% [†]	3% [∞]	6%*	3% [◇]	3%	5% [∞]
TV news feature story	0%	0%	1%*	2% [◇]	1% [†]	1%*	3%*	2%	1%	2%* [∞]
Friend, neighbor, relative, or co-worker	2%	5%	1%	3% [◇]	1% [†]	1%*	2%	1% [◇]	2%	3%
Contractor	0%	1%	1%*	1%	1%	1%	0%	0%	2% [†]	0% [∞]
Billboard	0%	1%	1%*	0% [◇]	1% [†]	1%	3%*	2%	2%	2%
Internet	5%	1% [◇]	4%	1% [◇]	3% [†]	5%* [∞]	5%	4%	4%	5%*
Realtor, lender, or builder		3%				2%				3% [∞]
Other	3%	4%	3%	1% [◇]	2% [†]	3% [∞]	2%	1% [◇]	3% [†]	1% [∞]

*Significantly different from the New Hampshire sample at the 90% confidence level.

[◇] Significantly different from 2001 at the 90% confidence level.

[†] Significantly different from 2002 at the 90% confidence level.

[∞] Significantly different from 2003 at the 90% confidence level.

Figure 7: Sources of Recognition of the ENERGY STAR Label, New Hampshire 2004

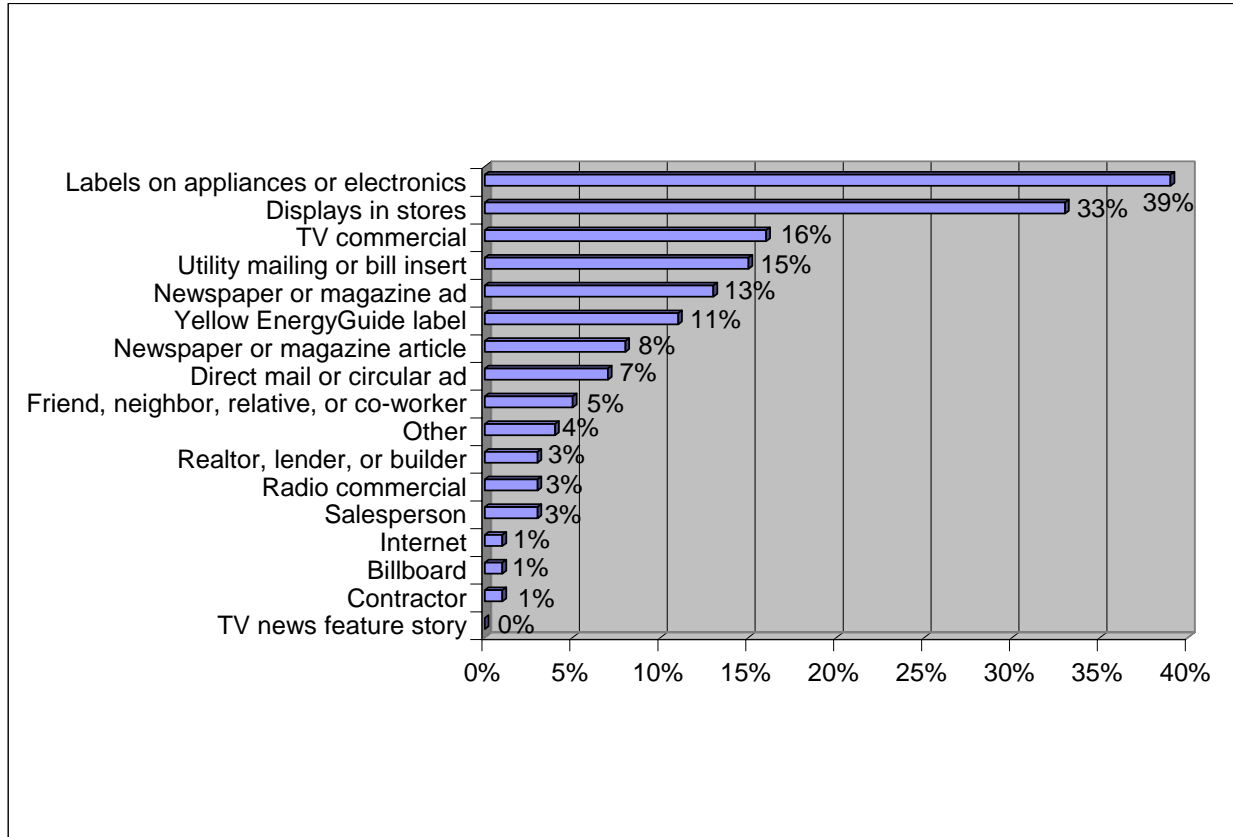


Table 2b
Source of Recognition, Additional States
(Base=All Respondents, 2004 only)

	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	100	107	508	53	50	57	94	70	190
Labels on appliances or electronic equipment	39%	40%	39%	17%*	29%	13%*	14%*	32%	42%
Displays in stores	33%	39%	38%	25%	24%	18%*	8%*	24%	28%
TV commercial	16%	20%	33%*	11%	9%	4%*	3%*	12%	23%
Yellow <i>EnergyGuide</i> label	11%	8%	13%	8%	1%*	3%*	4%*	19%	17%
Utility mailing or bill insert	15%	20%	11%	11%	10%	1%*	9%	12%	19%
Newspaper or magazine advertisement	13%	14%	16%	9%	5%*	2%*	2%*	7%	10%
Salesperson	3%	9%*	5%	2%	3%	2%	1%	0%*	4%
Radio commercial	3%	6%	5%	1%	0%*	0%*	0%*	3%	8%*
Newspaper or magazine article	8%	5%	7%	9%	1%*	2%*	1%*	0%*	4%
Direct mail or circular advertisement	7%	4%	5%	3%	3%	0%*	1%*	1%*	6%
TV news feature story	0%	0%	4%*	1%	0%	6%*	0%	0%	1%
Friend, neighbor, relative, or co-worker	5%	6%	3%	2%	0%*	0%*	0%*	0%*	3%
Contractor	1%	0%	1%	0%	4%	0%	1%	0%	0%
Billboard	1%	1%	4%*	1%	0%	0%	0%	0%	3%
Internet	1%	6%*	5%*	6%	1%	10%*	1%	1%	5%*
Realtor, lender, or builder	3%	2%	4%	1%	1%	1%	1%	0%*	3%
Other	4%	1%	1%	0%*	5%	2%	1%	5%	2%

*Significantly different from the New Hampshire sample at the 90% confidence level.

Tables 3a, Tables 3b, and Figure 8 show the products on which respondents recall seeing the ENERGY STAR label. New Hampshire residents are by far most likely to recall seeing the label on home appliances (47%). Compared to 2001, a significantly greater number of New Hampshire residents have seen the label on home appliances, lighting products, and building materials. In terms of specific products, significantly more NH respondents saw the label on: dishwashers, refrigerators, washing machines, microwave ovens, windows, and doors.

Overall, New Hampshire residents are significantly more likely than those in the U.S. as a whole to have seen the label on at least one product. People in New Hampshire are significantly likelier than those in the U.S. as a whole to recall seeing the label on refrigerators, clothes washers, and windows. However, people in New Hampshire are less likely than those in the U.S. as a whole and those in other high publicity areas to recall seeing the label on central air conditioners, printers, faxes, scanners, and televisions.

Many differences in both directions can be explained by promotions or product prevalence: product associations are higher where New Hampshire has programs promoting ENERGY STAR-labeled products, including appliances and lighting products. Product associations are lower for products that have relatively low saturations in New Hampshire (such as central air conditioners), and for which there has been no utility-sponsored program (such as home office products).

Table 3a
Product Associations: Where Seen ENERGY STAR Label
(Base=All Respondents)

Source	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	278	100	1997	1168	2676	1741	1256	580	908	949
Home Appliances										
Dishwasher	18%	31% [◇]	11%*	16% [◇]	17%	24% [∞]	21%	26% [◇]	24%	30% [∞]
Refrigerator	29%	42% [◇]	20%*	20%	23% [†]	31%* [∞]	35%*	31% [◇]	36% [†]	42% [∞]
Washing machine	21%	33% [◇]	12%*	14%	18% [†]	24%* [∞]	21%	24%	29% [†]	32%
Room air conditioner	19%	22%	11%*	10%	13% [†]	19% [∞]	26%*	14% [◇]	23% [†]	27% [∞]
Microwave oven	8%	18% [◇]	7%	8%	9%	14% [∞]	12%*	13%	14%	18% [∞]
Any appliance	36%	47%[◇]	25%*	23%	27%[†]	39%[∞]	41%	35%[◇]	41%[†]	50%[∞]
Heating and Cooling Products										
Central air conditioner	8%	10%	11%*	9% [◇]	12% [†]	18%* [∞]	15%*	13%	16%	20%* [∞]
Furnace or boiler	12%	10%	7%*	5% [◇]	8% [†]	12% [∞]	12%	7% [◇]	13% [†]	12%
Heat pump	1%	2%	2%	3% [◇]	3%	4% [∞]	2%	3%	4%	4%
Thermostat	3%	5%	4%	3%	3%	7% [∞]	5%*	5%	4%	8% [∞]
Any heating or cooling product	19%	18%	15%	11%[◇]	16%[†]	23%[∞]	21%	15%[◇]	22%[†]	27%*[∞]
Home Office Equipment										
Computer or monitor	27%	21%	22%*	16% [◇]	17%	20% [∞]	22%*	18% [◇]	22% [†]	21%
Computer printer	7%	1% [◇]	7%	4% [◇]	5%	7%* [∞]	8%	5% [◇]	7%	8%*
Copying machine	6%	5%	5%	4%	4%	6% [∞]	6%	7%	6%	7%
Fax machine	3%	1%	3%	3%	3%	4%* [∞]	5%	5%	5%	4%*
Scanner	4%	1% [◇]	3%	3%	3%	5%* [∞]	4%	4%	4%	5%*
Any home office equipment	29%	22%	24%*	18%[◇]	18%	21%[∞]	29%*	21%[◇]	24%	22%
Lighting										
Compact fluorescent bulb	8%	13%	7%	6%	6%	8% [∞]	10%	9%	12% [†]	12%
Lighting fixture	6%	11%	4%	5%	5%	6%	8%	7%	8%	8%
Any lighting	11%	20%[◇]	9%	7%[◇]	9%[†]	11%*[∞]	18%*	11%[◇]	15%[†]	15%

Table 3a, continued

Source	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	278	100	1997	1168	2676	1741	1256	580	908	949
Home Electronics										
Television	12%	7%	11%	8% [◇]	9%	13%* [∞]	14%	11% [◇]	13%	17%* [∞]
VCR	5%	5%	6%	4% [◇]	5%	7% [∞]	5%	6%	9% [†]	9%*
Audio product	3%	3%	3%	2% [◇]	4% [†]	5%	3%	2%	6% [†]	4% [∞]
Any home electronics	14%	8%[◇]	14%	9%[◇]	10%	16%*[∞]	18%*	13%[◇]	15%	19%*[∞]
Building Materials										
Window	9%	21% [◇]	6%*	10% [◇]	12% [†]	14%* [∞]	10%	13% [◇]	20% [†]	17% [∞]
Door	4%	10% [◇]	2%	4% [◇]	5%	7% [∞]	4%	6% [◇]	8%	7%
Skylight	1%	1%	0%*	1% [◇]	2% [†]	2%	1%	1%	3% [†]	3%*
Insulation	3%	7%	2%	4% [◇]	5%	6%	3%	6% [◇]	8%	7%
Roofing material	0%	2%	1%*	2% [◇]	1% [†]	2% [∞]	1%*	3% [◇]	1% [†]	3% [∞]
Any building materials	12%	23%[◇]	8%*	11%[◇]	13%[†]	16%[∞]	11%	15%[◇]	20%[†]	19%
Newly Built Home	2%	6%	3%	4%	7% [†]	9% [∞]	4%*	7% [◇]	10% [†]	9%
Seen on at Least One Product	45%	61%[◇]	36%*	38%	39%	50%*[∞]	51%*	50%	50%	60%[∞]

*Significantly different from the New Hampshire sample at the 90% confidence level.

[◇] Significantly different from 2001 at the 90% confidence level.

[†] Significantly different from 2002 at the 90% confidence level.

[∞] Significantly different from 2003 at the 90% confidence level.

Figure 8: Percent of Products Seen with the ENERGY STAR Label, New Hampshire 2004

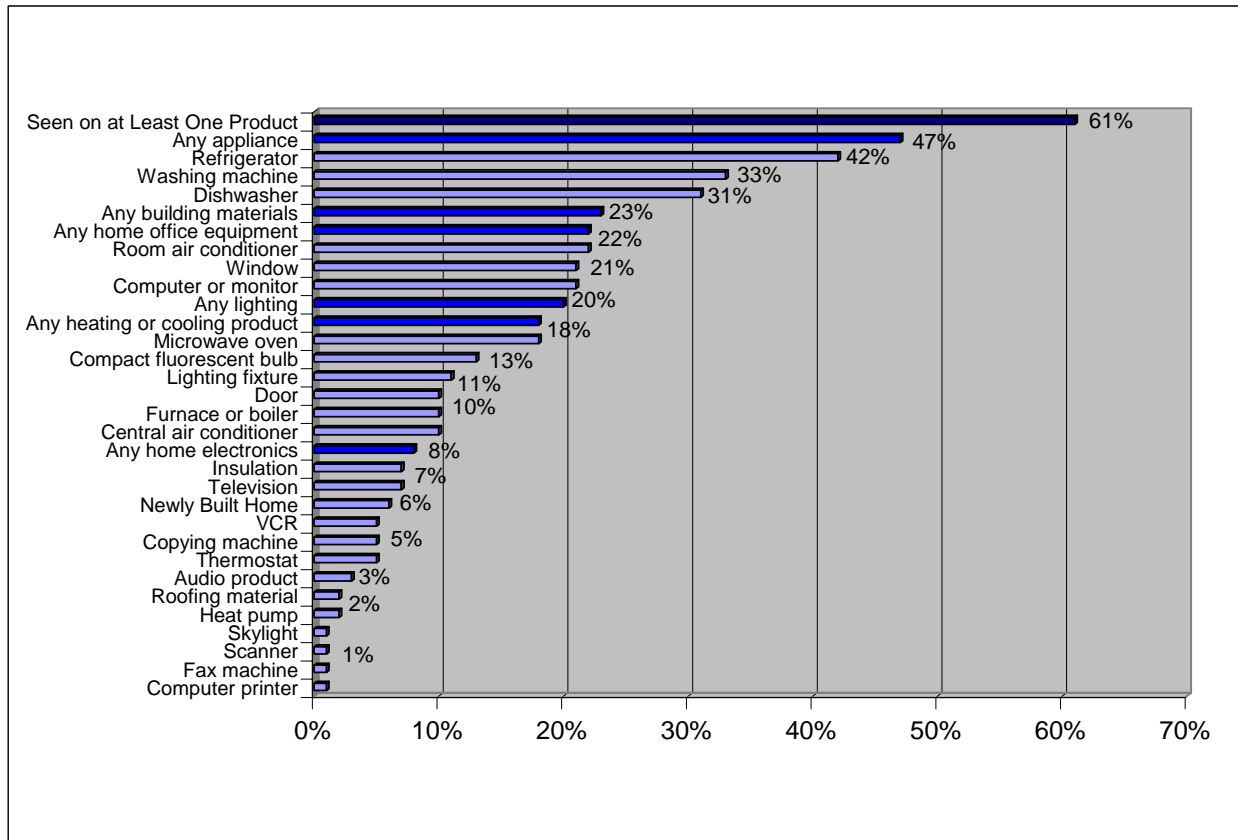


Table 3b
Product Associations: Where Seen ENERGY STAR Label, Additional States
(Base=All Respondents, 2004 only)

Product	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	100	107	508	53	50	57	94	70	190
Home Appliances									
Dishwasher	31%	31%	33%	22%	19%*	22%	18%*	31%	30%
Refrigerator	42%	37%	51%*	25%*	20%*	24%*	22%*	34%	42%
Washing machine	33%	33%	37%	21%	22%	19%*	12%*	24%	30%
Room air conditioner	22%	36%*	40%*	27%	27%	14%	9%*	20%	15%
Microwave oven	18%	16%	21%	11%	8%*	16%	7%*	18%	29%*
Any appliance	47%	55%	57%*	30%*	35%	32%*	25%*	43%	48%
Heating and Cooling Products									
Central air conditioner	10%	20%*	23%*	15%	12%	24%*	10%	28%*	24%*
Furnace or boiler	10%	14%	15%	8%	19%	14%	6%	14%	12%
Heat pump	2%	5%	4%	2%	5%	5%	8%*	7%	4%
Thermostat	5%	8%	5%	7%	11%	2%	3%	4%	11%*
Any heating or cooling product	18%	31%*	27%*	18%	21%	24%	18%	35%*	31%*
Home Office Equipment									
Computer or monitor	21%	19%	18%	7%*	28%	14%	11%*	22%	26%
Computer printer	1%	4%	7%*	6%	6%	3%	3%	11%*	11%*
Copying machine	5%	5%	7%	7%	11%	6%	2%	11%	9%
Fax machine	1%	1%	5%*	4%	7%	6%	0%	9%*	4%*
Scanner	1%	2%	5%*	4%	3%	1%	2%	9%*	7%*
Any home office equipment	22%	19%	21%	10%*	29%	15%	11%*	24%	27%
Lighting									
Compact fluorescent bulb	13%	21%	7%*	7%	9%	6%	3%*	8%	9%
Lighting fixture	11%	14%	6%	6%	9%	6%	4%*	6%	5%*
Any lighting	20%	26%	9%*	11%	9%*	12%	6%*	14%	12%*
Home Electronics									
Television	7%	17%*	16%*	12%	12%	12%	10%	19%*	22%*
VCR	5%	9%	8%	8%	7%	10%	4%	9%	9%
Audio product	3%	3%	4%	0%*	3%	5%	2%	12%*	6%
Any home electronics	8%	20%*	18%*	12%	14%	15%	11%	22%*	23%*
Building Materials									
Window	21%	15%	18%	15%	3%*	11%*	6%*	19%	17%
Door	10%	7%	9%	8%	1%*	4%	1%*	9%	4%*
Skylight	1%	1%	4%*	3%	0%	0%	0%	0%	3%
Insulation	7%	7%	7%	6%	2%	4%	4%	7%	7%
Roofing material	2%	0%	3%	0%	0%	0%	2%	0%	5%
Any building materials	23%	18%	20%	19%	3%*	11%*	7%*	22%	19%
Newly Built Home	6%	5%	13%*	5%	2%	4%	16%*	14%*	10%
Seen on at Least One Product	61%	66%	65%	41%*	51%	43%*	29%*	53%	61%

*Significantly different from the New Hampshire sample at the 90% confidence level.

4. Understanding

After all respondents had seen the ENERGY STAR label in the Web TV survey, they were asked what it means to them (people who had recognized the label) or the messages that come to mind when they see the label (people who had not recognized the label). Table 4 shows their responses, grouped by those showing a high understanding of the label, a general understanding of the label, and no understanding. The table also classifies all respondents by level of understanding; a respondent is first classified into “no understanding” if any response shows no understanding, and then successively into “general understanding” if any response shows general understanding, and finally into “high understanding” if any response shows high understanding. Hence, while a given respondent could have a specific response in more than one category, they would be counted only once when the responses are grouped.

Understanding in New Hampshire has significantly increased compared to 2001 - 70% of New Hampshire residents demonstrate a high understanding of the label, up from 42%. New Hampshire respondents are significantly more likely than respondents in the U.S. as a whole to show a high understanding of the ENERGY STAR label, and significantly less likely to show no understanding. New Hampshire respondents also report higher understanding than those in other high publicity areas, though not significantly more so. Importantly, of the states considered, only Californians reported higher understanding of the ENERGY STAR label.

Of those respondents who were categorized as having high understanding, the majority mentioned “energy efficiency” or “energy savings”.

Table 4a
Understanding:
What Does the ENERGY STAR Label Mean to You OR
Type the Messages that Come to Mind When You See the ENERGY STAR Label
(Base=All Respondents; multiple response)

Source	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	278	100	1997	1168	2676	1741	1256	580	908	949
High understanding (not multiple response)	42%	70%[◇]	34%*	49%[◇]	52%[†]	57%*[∞]	46%	49%	61%[†]	67%[∞]
Energy efficiency/savings	26%	49% [◇]	22%	37% [◇]	35%	42% [∞]	29%	36% [◇]	42% [†]	49% [∞]
Energy conservation	12%	3% [◇]	9%	4% [◇]	6% [†]	8%* [∞]	11%	3% [◇]	7% [†]	8%*
Saving money on operation	5%	6%	6%	4% [◇]	3%	5% [∞]	10%*	5% [◇]	5%	8% [∞]
Environmental benefit	7%	9%	5%	10% [◇]	8% [†]	8%	8%	11% [◇]	6% [†]	9% [∞]
Energy or environmental product standards	0%	11% [◇]	1%*	2% [◇]	8% [†]	3%* [∞]	1%*	2%	10% [†]	4%* [∞]
General understanding (not multiple response)	17%	7%[◇]	20%	14%[◇]	13%	12%*	14%	15%	11%[†]	8%*[∞]
Energy, no link to efficiency	1%	3%	1%	3% [◇]	2% [†]	6%* [∞]	1%	3% [◇]	1% [†]	3%* [∞]
Mentions specific products	6%	2% [◇]	5%	2% [◇]	3% [†]	3%	7%	3% [◇]	2%	2%
Savings (unspecified)	1%	0% [◇]	1%	1%	1%	1%*	1%	1%	2%	1%* [∞]
Electricity, power	3%	0% [◇]	3%	2% [◇]	2%	1%* [∞]	3%	1% [◇]	1%	1%*
Confused with <i>EnergyGuide</i> label	1%	3%	2%	1% [◇]	0% [†]	1% [∞]	2%	0% [◇]	1% [†]	1%
Environment, no link to benefits	0%	1%	0%	1% [◇]	2% [†]	0% [∞]	0%	1% [◇]	2%	1% [∞]
Product standards, no link to energy/environment	13%	1% [◇]	16%	1% [◇]	1%	1%	11%	0% [◇]	1% [†]	1%
Gas/oil	0%	0%	0%	1% [◇]	0% [†]	0%	0%	0%	0%	0%
Rebate	0%	2%	0%	1% [◇]	0% [†]	0%	0%	0%	1% [†]	1%
No understanding (not multiple response)	40%	23%[◇]	46%*	36%[◇]	35%	31%*[∞]	40%	37%	28%[†]	25%*

*Significantly different from the New Hampshire sample at the 90% confidence level.

[◇] Significantly different from 2001 at the 90% confidence level.

[†] Significantly different from 2002 at the 90% confidence level.

[∞] Significantly different from 2003 at the 90% confidence level.

Table 4b
Understanding: What Does the ENERGY STAR Label Mean to You OR
Type the Messages that Come to Mind When You See the ENERGY STAR Label Additional States
(Base=All Respondents, 2004 only; multiple response)

Source	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	100	107	508	53	50	57	94	70	190
High understanding (not multiple response)	70%	65%	66%	56%*	63%	47%*	46%*	51%*	76%
Energy efficiency/savings	49%	55%	46%	40%	49%	40%	35%*	46%	56%
Energy conservation	3%	2%	5%	8%	8%	5%	7%	1%	10%*
Saving money on operation	6%	7%	10%	4%	3%	4%	2%	0%*	9%
Environmental benefit	9%	5%	12%	6%	12%	4%	5%	8%	9%
Energy or environmental product standards	11%	6%	5%*	0%*	0%*	8%	0%*	0%*	5%*
General understanding (not multiple response)	7%	10%	10%	9%	11%	14%	13%	14%	4%
Energy, no link to efficiency	3%	1%	4%	6%	2%	6%	6%	11%*	2%
Mentions specific products	2%	1%	2%	0%	3%	4%	2%	2%	1%
Savings (unspecified)	0%	4%*	1%*	1%	0%	3%	0%	0%	0%
Electricity, power	0%	0%	1%*	0%	1%	0%	5%*	3%	1%
Confused with <i>EnergyGuide</i> label	3%	4%	1%	1%	0%*	5%	0%*	0%*	0%*
Environment, no link to benefits	1%	1%	1%	0%	0%	0%	0%	0%	0%
Product standards, no link to energy/environment	1%	3%	1%	0%	6%	0%	2%	0%	0%
Gas/oil	0%	0%	1%*	0%	0%	0%	0%	0%	0%
Rebate	2%	0%	1%	0%	0%	0%	1%	0%	0%
No understanding (not multiple response)	23%	25%	24%	35%	26%	39%*	41%*	35%*	20%

*Significantly different from the New Hampshire sample at the 90% confidence level.

5. Product Purchases and Shopping

Tables 5a through 5d show, among those who bought each product type in the past year, the proportion who saw the ENERGY STAR label on the product they bought, or on the packaging or instructions. Compared to 2001, New Hampshire residents are now significantly more likely to have purchased a dishwasher, light bulb, microwave oven, and window with the ENERGY STAR label. People in New Hampshire are significantly more likely than those in the U.S. as a whole to have purchased appliances (in general) with an ENERGY STAR label.

The net effect is that people in New Hampshire are more likely, though not significantly, to recall seeing the label on their newly purchased products than are people in the country as a whole and those in high publicity regions. It is important to emphasize here that recall of the label on newly purchased products is not the same as market share, as witnessed by the less frequent recall of the ENERGY STAR label on newly purchased office equipment in New Hampshire compared to elsewhere; anecdotal evidence, plus the high proportion of home office equipment that qualifies for the label, would lead us to expect similar market shares of ENERGY STAR-labeled office equipment in New Hampshire as elsewhere in the U.S.

Table 5a
Product Purchases—Percent with ENERGY STAR Label
(Base=Respondents Who Have Bought Each Product Type, 2004 only)

	NH		US		Oth. Hi. Pub.	
	n	% ES	n	% ES	n	% ES
Home Appliances						
Dishwasher	10	58.9% [◇]	108	34.4%	63	46.5%
Refrigerator	8	49.1%	156	33.2%	90	45.0%
Washing machine	7	45.6%	133	35.3%	71	62.8%
Room air conditioner	12	44.3%	164	36.8%	114	51.0%
Microwave oven	13	36.0% [◇]	140	23.5% [†]	71	33.0%
All appliances	36	50.8% [◇]	495	33.2%* [†]	289	46.1% [†]
Heating and Cooling Products						
Central air conditioner	3	19.5%	62	19.9%	26	25.0%
Furnace or boiler	1	0%	57	25.5%	37	51.7%
Heat pump	1	0%	14	16.1%	4	46.0%
Thermostat	3	24.6%	82	24.5% [†]	45	34.8%
All heating and cooling products	8	16.8%	154	24.3% [†]	81	34.9%
Home Office Equipment						
Computer or monitor	14	24.9%	282	24.2%	152	27.2%
Computer printer	13	0.0%	264	18.5%* [†]	147	20.0%*
Copying machine	1	0.0%	68	16.5% [†]	42	12.3%
Fax machine	4	0.0%	75	14.3%*	44	6.5%*
Scanner	3	0.0%	105	18.3%*	67	18.0%*
All home office equipment	23	14.3%	445	21.2%	246	21.7%
Lighting						
Lighting fixture	16	16.0%	185	13.4%	103	20.0%
Compact fluorescent light bulb	6	51.7% [◇]	183	22.1%	102	22.8% [†]
All lighting	21	35.4% [◇]	318	19.5%	177	24.6% [†]
Home Electronics						
Television	14	0.0% [◇]	259	17.1%*	128	14.8%* [†]
VCR	7	0.0% [◇]	142	20.4%* [†]	77	19.3%*
Audio product	4	10.1%	131	6.4% [†]	69	5.8% [†]
All home electronics	21	1.5% [◇]	429	16.1%*	219	15.8%* [†]
Building Product/New home						
Window	15	31.0% [◇]	122	24.1%	66	30.9%
Door	17	8.6%	129	12.1%	62	20.7%
Skylight	1	0.0%	10	9.1%	5	26.0%
Insulation	8	19.3%	85	6.1%	49	14.3% [†]
Roofing material	10	0.0%	91	11.2%*	45	2.1% [†]
Newly built home	1	0.0%	30	23.3%	15	25.1%
All building products/new homes	26	27.9% [◇]	283	16.7%	149	18.8%
All Products	69	35.9%	1102	26.8%	601	31.2%

*Significantly different from the New Hampshire sample at the 90% confidence level.

[†]Significantly different from 2003 at the 90% confidence level.

[◇]Significantly different from 2001 at the 90% confidence level.

Figure 9: Percent of Products Purchased with the ENERGY STAR Label, New Hampshire 2004

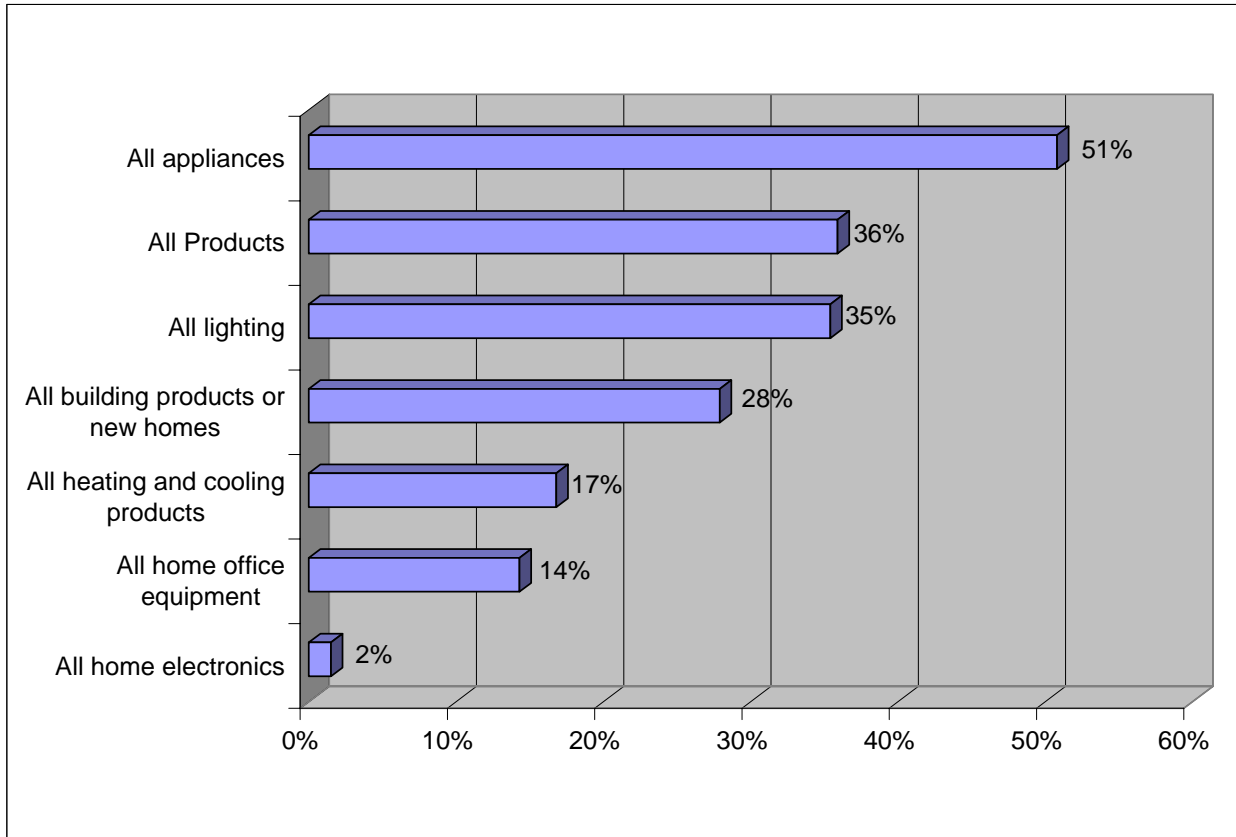


Table 5b
Product Purchases—Percent with ENERGY STAR Label
(Base=Respondents Who Have Bought Each Product Type, 2003 only)

	US		Oth. Hi. Pub.	
	n	% ES	n	% ES
Home Appliances				
Dishwasher	142	26.6% [†]	45	41.7%
Refrigerator	204	33.6% [†]	75	32.6%
Washing machine	184	36.4% [†]	75	51.6% [†]
Room air conditioner	163	34.2%	77	41.5%
Microwave oven	211	14.4%	67	22.7%
All appliances	642	27.4% [†]	241	36.3%
Heating and Cooling Products				
Central air conditioner	86	13.0%	16	37.2%
Furnace or boiler	79	24.0%	21	32.3%
Heat pump	20	11.9%	10	18.7%
Thermostat	116	11.5%	28	28.3%
All heating and cooling products	214	15.8%	59	29.2%
Home Office Equipment				
Computer or monitor	378	26.9%	125	26.4%
Computer printer	374	12.9%	123	17.6%
Copying machine	83	7.0%	35	13.8%
Fax machine	103	7.8% [†]	44	15.7% [†]
Scanner	158	12.6%	61	23.5%
All home office equipment	634	20.5%	216	22.3%
Lighting				
Lighting fixture	315	10.0%	131	25.3% [†]
Compact fluorescent light bulb	301	26.8%	91	40.3%
All lighting	520	19.4% [†]	197	33.1%
Home Electronics				
Television	371	17.1% [†]	115	25.7% [†]
VCR	232	10.6% [†]	77	19.5% [†]
Audio product	236	15.2% [†]	75	27.2% [†]
All home electronics	665	16.1% [†]	208	24.9% [†]
Building Product/New home				
Window	187	24.0%	53	37.4% [†]
Door	211	9.7%	52	23.5%
Skylight	23	23.9%	10	19.6%
Insulation	118	11.7%	28	32.6%
Roofing material	151	5.3% [†]	54	11.0%
Newly built home	42	23.6%	9	7.8%
All building products/new homes	451	13.6%	128	21.4%
All Products	1643	24.2% [†]	571	33.2%

[†] Significantly different from 2002 at the 90% confidence level.

Table 5c
Product Purchases—Percent with ENERGY STAR Label
(Base=Respondents Who Have Bought Each Product Type, 2002 only)

	US		Oth. Hi. Pub.	
	n	% ES	n	% ES
Home Appliances				
Dishwasher	47	15.8%	19	32.8%
Refrigerator	87	19.2%	49	41.0%
Washing machine	74	19.0%	45	31.3%
Room air conditioner	99	26.8% [†]	64	39.9% [†]
Microwave oven	82	12.5%	33	31.4%
All appliances	297	20.4%	157	37.1%
Heating and Cooling Products				
Central air conditioner	36	17.0%	15	45.8%
Furnace or boiler	31	13.0%	14	42.5%
Heat pump	11	21.8%	5	23.5%
Thermostat	44	13.8% [†]	22	34.4% [†]
All heating and cooling products	83	12.4%	38	30.3%
Home Office Equipment				
Computer or monitor	120	29.5%	64	25.3%
Computer printer	124	15.5% [†]	59	17.8% [†]
Copying machine	24	15.7%	13	19.5% [†]
Fax machine	32	29.1% [†]	19	49.5% [†]
Scanner	50	10.6% [†]	24	10.4%
All home office equipment	207	25.7% [†]	106	28.4%
Lighting				
Lighting fixture	132	6.4% [†]	67	15.1% [†]
Compact fluorescent light bulb	143	22.6% [†]	79	31.1% [†]
All lighting	225	13.7% [†]	112	24.8% [†]
Home Electronics				
Television	172	4.5% [†]	77	12.3%
VCR	128	5.5%	72	9.7%
Audio product	116	7.1%	63	6.8%
All home electronics	323	6.2%	165	10.8%
Building Product/New home				
Window	74	21.9% [†]	44	19.2% [†]
Door	79	8.3%	43	15.6% [†]
Skylight	5	15.0%	4	20.4%
Insulation	47	14.1% [†]	23	21.8% [†]
Roofing material	70	1.2%	33	6.4%
Newly built home	16	8.2%	2	0.0%
All building products/new homes	190	11.6% [†]	94	20.0% [†]
All Products	715	18.2%	359	29.9%

[†] Significantly different from 2001 at the 90% confidence level.

Table 5d
Product Purchases—Percent with ENERGY STAR Label
(Base=Respondents Who Have Bought Each Product Type, 2001 only)

	NH		US		Oth. Hi. Pub.	
	n	% ES	n	% ES	n	% ES
Home Appliances						
Dishwasher	25	16%	142	11%	109	27%
Refrigerator	43	47%	230	18%*	179	36%
Washing machine	34	29%	186	14%*	143	34%
Room air conditioner	38	21%	247	15%	211	19%
Microwave oven	27	7%	186	9%	132	18%*
All appliances	112	30%	658	17%*	510	31%
Heating and Cooling Products						
Central air conditioner	7	0%	91	12%*	55	40%*
Furnace or boiler	18	6%	125	13%	92	27%*
Heat pump	3	0%	22	13%*	15	0%
Thermostat	13	8%	123	3%	91	2%*
All heating and cooling products	33	6%	259	13%	188	24%
Home Office Equipment						
Computer or monitor	75	27%	455	26%	351	30%
Computer printer	52	4%	339	3%	249	3%
Copying machine	9	0%	71	3%	45	0%
Fax machine	19	5%	118	1%	95	2%
Scanner	29	0%	173	3%*	132	1%
All home office equipment	104	22%	634	19%	480	23%
Lighting						
Lighting fixture	45	7%	280	1%	204	1%
Compact fluorescent light bulb	33	6%	219	6%	167	11%
All lighting	61	7%	412	4%	302	7%
Home Electronics						
Television	54	9%	337	14%	245	17%*
VCR	38	8%	244	8%	167	9%
Audio product	42	0%	216	3%*	151	3%*
All home electronics	99	8%	583	9%	414	13%
Building Product/New home						
Window	32	3%	179	4%	145	2%
Door	31	0%	173	3%*	132	1%
Skylight	5	0%	25	0%	18	2%
Insulation	19	0%	116	3%*	95	1%
Roofing material	32	3%	139	4%	103	1%
Newly built home	7	0%	23	0%	14	0%
All building products/new homes	75	3%	416	3%	316	2%
All Products	212	26%	1330	21%	994	31%

*Significantly different from the New Hampshire sample at the 90% confidence level.

Table 5e
Product Purchases—Percent with ENERGY STAR Label, Additional States
(Base=Respondents Who Have Bought Each Product Type, 2004 only)

	NH		MA		NY		NJ		PA		OH		FL		TX		CA	
	n	% ES	n	% ES	n	% ES	n	% ES	n	% ES	n	% ES	n	% ES	n	% ES	n	% ES
Home Appliances																		
Dishwasher	10	59%	7	59%	33	46%	5	32%	2	0%*	4	21%	3	21%	1	100%	12	44%
Refrigerator	8	49%	12	60%	45	42%	5	39%	4	0%*	5	25%	5	0%*	10	22%	15	61%
Washing machine	7	46%	12	60%	40	59%	0	0%*	3	12%	5	45%	5	16%	8	18%	13	86%*
Room air conditioner	12	44%	23	51%	71	38%	6	77%	7	0%*	6	41%	2	44%	6	7%*	9	64%
Microwave oven	13	36%	5	8%	45	22%	2	0%*	0	0%*	4	58%	7	0%*	2	0%*	11	37%
All appliances	36	51%	37	46%	164	38%	12	43%	11	5%*	18	27%*	14	10%*	18	22%*	45	53%
Heating and Cooling Products																		
Central air conditioner	3	20%	5	24%	11	31%	4	0%	1	0%	3	35%	5	9%	4	0%	6	38%
Furnace or boiler	1	0%	7	34%	21	55%	5	12%	1	0%	2	0%	0	0%	2	0%*	4	100%
Heat pump	1	0%	1	0%	1	0%	0	0%	0	0%	0	0%	0	0%	1	100%	1	100%
Thermostat	3	25%	7	87%*	17	9%	5	0%	2	0%	6	19%	5	0%	2	0%	13	55%
All heating and cooling products	8	17%	17	44%	34	34%	9	7%	3	0%	6	36%	8	4%	6	0%	18	49%*
Home Office Equipment																		
Computer or monitor	14	25%	27	19%	75	16%	5	0%*	10	4%	8	53%*	14	8%	11	15%	33	36%
Computer printer	13	0%	22	21%*	82	13%*	8	21%	9	4%	7	46%	11	0%	12	24%*	29	25%*
Copying machine	1	0%	4	0%	19	5%	2	72%	1	0%	2	0%	1	0%	5	48%	14	13%
Fax machine	4	0%	7	4%	26	8%	0	0%	0	0%	3	0%	2	0%	3	78%*	9	7%
Scanner	3	0%	9	7%	36	3%	2	55%	1	0%	3	0%	3	0%	7	27%	14	20%*
All home office equipment	23	14%	39	17%	129	14%	12	23%	14	3%	10	49%*	20	4%	19	21%	49	23%
Lighting																		
Lighting fixture	16	16%	19	51%*	43	3%	7	0%*	2	29%	7	0%*	8	6%	9	0%*	26	23%
Compact fluor. light bulb	6	52%	17	27%	57	18%	3	47%	8	46%	9	21%	8	8%*	10	13%	19	15%
All lighting	21	35%	30	39%	90	8%*	9	39%	9	37%	13	14%	14	8%*	14	7%*	35	25%

Table 5e, continued

	NH		MA		NY		NJ		PA		OH		FL		TX		CA	
	n	% ES	n	% ES	n	% ES	n	% ES	n	% ES	n	% ES	n	% ES	n	% ES	n	% ES
Home Electronics																		
Television	14	0%	15	22%*	74	14%*	9	14%	6	0%	12	28%*	18	10%	10	30%*	23	8%
VCR	7	0%	6	25%	43	24%*	6	30%	5	24%	12	18%	4	51%*	6	0%	18	12%
Audio product	4	10%	4	0%	40	9%	3	0%	3	8%	4	0%	6	6%	4	0%	14	4%
All home electronics	21	1%	21	23%*	122	16%*	15	22%*	11	17%	22	21%*	22	10%	18	13%	43	10%*
Building Product/New home																		
Window	15	31%	12	45%	35	38%	4	0%*	1	0%	3	49%	5	0%*	3	37%	10	43%
Door	17	9%	9	48%*	35	25%	5	0%	3	18%	4	0%	6	0%	3	0%	4	40%
Skylight	1	0%	4	50%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Insulation	8	19%	6	44%	32	9%	3	0%	5	0%	1	0%	1	0%	4	0%	4	42%
Roofing material	10	0%	8	8%	29	0%	4	0%	1	0%	4	0%	4	65%*	2	0%	3	0%
Newly built home	1	0%	2	59%	8	16%	1	0%	1	0%	1	0%	1	0%	1	0%	2	35%
All building products/new homes	26	28%	22	25%	82	20%	10	0%*	8	8%	7	19%	12	29%	10	8%	19	37%
All Products	69	36%	80	33%	319	27%	31	19%*	33	21%	36	29%	50	16%*	39	22%	112	33%

*Significantly different from the New Hampshire sample at the 90% confidence level.

Tables 6a and 6b show the proportions of respondents buying and not buying each product type in the past 12 months who express unaided recognition of the ENERGY STAR label. Note that, because unaided recognition was not measured in the 2001 mail survey, no results are available. While purchasers in NH express higher unaided recognition than do non-purchasers, these differences are significantly different only for appliances. In addition, people in the U.S. as a whole, regardless of whether or not they have bought products, are less likely to express unaided recognition than their counterparts in New Hampshire; some of these differences are significant. However, there are few substantial differences between New Hampshire and other high publicity areas among buyers and non-buyers of all products.

Likewise, recognition among both buyers and non-buyers was not significantly different in New Hampshire than in other “well known” ENERGY STAR states such as Massachusetts, New York, and California. By contrast, New Hampshire buyers and non-buyers have a great deal higher recognition than those in many of the less active states.

Table 6a
Purchased Products in Past 12 Months by
Unaided Recognition of ENERGY STAR Label
(Base=All Respondents)

		NH		US						Other High Publicity Areas					
		2004		2002		2003		2004		2002		2003		2004	
		n	% unaid	n	% unaid	n	% unaid	n	% unaid	n	% unaid	n	% unaid	n	% unaid
Any appliance	Bought	36	61% [†]	297	27% [†]	642	32% [†]	495	46%* [†] [∅]	157	46% [†]	241	44% [†]	289	69% [†] [∅]
	did not buy	64	40%	871	20%	2034	21%	1246	33% [∅]	423	28%	667	35% [∞]	660	42% [∅]
Any heating/cooling	Bought	8	41%	83	21%	214	32% [†] [∞]	154	43% [†] [∅]	38	42%	59	47%	81	64% [†] [∅]
	did not buy	92	48%	1085	22%	2462	23%	1587	35%* [∅]	542	32%	849	37% [∞]	868	48% [∅]
Any home office equipment	Bought	23	57%	207	43% [†]	634	31% [†] [∞]	445	44% [†] [∅]	106	51% [†]	216	49% [†]	246	56% [†]
	did not buy	77	45%	961	18%	2042	22% [∞]	1296	34%* [∅]	474	29%	692	34% [∞]	703	47% [∅]
Any lighting	Bought	21	61%	225	37% [†]	520	31% [†]	318	45% [†] [∅]	112	45% [†]	197	44% [†]	177	58% [†] [∅]
	did not buy	79	44%	943	18%	2156	22% [∞]	1423	34%* [∅]	468	29%	711	36% [∞]	772	48% [∅]
Any home electronics	Bought	21	55%	323	24%	665	24%	429	36%* [∅]	165	30% [†]	208	43% [∞]	219	52% [∅]
	did not buy	79	46%	845	21%	2011	24% [∞]	1312	36%* [∅]	415	33%	700	36%	730	48%
Any building product/new home	Bought	26	54%	190	24%	451	28%	283	38% [∅]	94	37% [†]	128	47%	149	55% [∅]
	did not buy	74	45%	978	21%	2225	23%	1458	36% [∅]	486	31%	780	36% [∞]	800	48% [∅]
Any product	Bought	69	53%	715	25% [†]	1643	29% [†] [∞]	1102	41%* [∅]	359	37% [†]	571	44% [†] [∞]	601	56% [†] [∅]
	did not buy	31	38%	453	16%	1033	16%	639	29% [∅]	221	25%	337	27%	348	39% [∅]

*Significantly different from the New Hampshire sample at the 90% confidence level.

[†]Significantly different from “did not buy” at the 90% confidence level.

[∞]Significantly different from 2002 at the 90% confidence level.

[∅]Significantly different from 2003 at the 90% confidence level.

Table 6b
Purchased Products in Past 12 Months by
Unaided Recognition of ENERGY STAR Label, Additional States
(Base=All Respondents, 2004 only)

		NH		MA		NY		NJ		PA		OH		FL		TX		CA	
		%		%		%		%		%		%		%		%		%	
		n	unaided	n	unaided	n	unaided	n	unaided	n	unaided	n	unaided	n	unaided	n	unaided	n	unaided
Any appliance	bought	36	61% [†]	37	65%	164	61% [†]	12	50% [†]	11	35%	18	13%*	14	5%*	18	31%*	45	74% [†]
	did not	64	40%	70	50%	344	49%	41	21%*	39	35%	39	31%	80	14%*	52	34%	145	48%
Any heating/ cooling	bought	8	41%	17	79%* [†]	34	64%	9	23%	3	0%* [†]	6	36%	8	49% [†]	6	16%	18	63%
	did not	92	48%	90	50%	474	52%	44	28%*	47	39%	51	26%*	86	8%*	64	35%	172	52%
Any home office equipment	bought	23	57%	39	60%	129	63% [†]	12	59% [†]	14	29%*	10	55% [†]	20	5%*	19	22%*	49	46%
	did not	77	45%	68	51%	379	50%	41	18%*	36	37%	47	21%*	74	14%*	71	38%	141	55%
Any lighting	bought	21	61%	30	64%	90	47%	9	66% [†]	9	64% [†]	13	14%*	14	41% [†]	14	20%*	35	50%
	did not	79	44%	77	50%	418	54%	44	21%*	41	27%*	44	30%	80	8%*	56	38%	155	54%
Any home electronics	bought	21	55%	21	58%	122	61% [†]	15	33%	11	60% [†]	22	18%*	22	10%*	18	22%*	43	48%
	did not	79	46%	86	53%	386	49%	38	26%*	39	28%*	35	32%	72	13%*	52	38%	147	55%
Any building product/new home	bought	26	54%	22	76% [†]	82	61% [†]	10	34%	8	8%* [†]	7	35%	12	0%* [†]	10	32%	19	76% [†]
	did not	74	45%	85	49%	426	50%	43	27%*	42	39%	50	26%*	82	14%*	60	34%	171	51%
Any product	bought	69	53%	80	61% [†]	319	60% [†]	31	36%	33	42%	36	22%*	50	16%*	39	36%*	112	56%
	did not	31	38%	27	40%	189	40%	22	18%	17	21%	21	33%	44	8%*	31	31%	78	49%

*Significantly different from the New Hampshire sample at the 90% confidence level.

[†]Significantly different from “did not buy” at the 90% confidence level.

Tables 7a and 7b show the proportions of respondents buying and not buying each product type in the past 12 months who express *aided* recognition of the ENERGY STAR label. Compared to 2001, aided recognition is significantly higher for New Hampshire residents for all but the ‘any products – did not buy’ category. However, there were no significant differences between purchasers and non-purchasers in NH, indicating that even those customers who have not bought products are still aware of the label.

In addition, New Hampshire residents who have or have not bought products are more likely than those in the U.S. as a whole to recognize the ENERGY STAR label; most of these differences are significant. However, there are no significant differences in awareness between New Hampshire and other high publicity regions. New Hampshire had similar recognition to active states such as Massachusetts, New York, and California, but generally higher recognition than the less active states.

**Table 7a
Purchased Products in Past 12 Months by
Aided Recognition of ENERGY STAR Label
(Base=All Respondents)**

		NH				US								Other High Publicity Areas							
		2001		2004		2001		2002		2003		2004		2001		2002		2003		2004	
		n	% aid	n	% aid	n	% aid	n	% aid	n	% aid	n	% aid	n	% aid	n	% aid	n	% aid	n	% aid
Any appliance	Bought	112	50%	36	78% [◇]	657	41%*	297	42%	642	61% ^{†‡}	495	76% ^{†∞}	401	52%	157	61% ^{†◇}	241	68% [†]	289	83% ^{†‡}
	did not buy	166	49%	64	76% [◇]	1338	39%*	871	38%	2034	48% [^]	1246	58%* [∞]	854	54%	423	50%	667	59% [^]	660	68% [∞]
Any heating/cooling	Bought	33	55%	8	76%	259	38%*	83	48%	214	51%	154	74% ^{†∞}	157	51%	38	59%	59	54%	81	81% ^{†‡}
	did not buy	245	49%	92	77% [◇]	1736	40%*	1085	38%	2462	51% [^]	1587	61%* [∞]	1098	54%	542	52%	849	62% [^]	868	71% [∞]
Any home office equipment	Bought	104	55%	23	86% [◇]	634	45%* [†]	207	66% ^{†◇}	634	64% [†]	445	78% ^{†∞}	380	54%	106	74% ^{†◇}	216	74% [†]	246	77% [†]
	did not buy	174	46%	77	74% [◇]	1361	37%*	961	34%	2042	47% [^]	1296	58%* [∞]	875	54%*	474	48% [◇]	692	58% [^]	703	71% [∞]
Any lighting	Bought	61	49%	21	86% [◇]	411	33%* [†]	225	54% ^{†◇}	520	57% [†]	318	77% ^{†∞}	244	45% [†]	112	62% ^{†◇}	197	68% [†]	177	79% ^{†‡}
	did not buy	217	49%	79	74% [◇]	1584	42%*	943	35% [◇]	2156	50% [^]	1423	59%* [∞]	1011	56%*	468	50% [◇]	711	60% [^]	772	71% [∞]
Any home electronics	Bought	99	37% [†]	21	84% [◇]	583	37% [†]	323	39% [†]	665	58% ^{†‡}	429	68%* ^{†‡}	320	50%*	165	49%	208	67% ^{†‡}	219	77% ^{†‡}
	did not buy	179	56%	79	75% [◇]	1412	41%*	845	39%	2011	49% [^]	1312	61%* [∞]	935	55%	415	53%	700	59% [^]	730	70% [∞]
Any building product/new home	Bought	75	40% [†]	26	82% [◇]	415	28%* [†]	190	39% ^{†◇}	451	57% ^{†‡}	283	71% ^{†∞}	245	42% [†]	94	44% [◇]	128	67% [^]	149	76% [∞]
	did not buy	203	53%	74	75% [◇]	1580	42%*	978	39%	2225	50% [^]	1458	61%* [∞]	1010	56%	486	53%	780	61% [^]	800	71% [∞]
Any product	Bought	212	44% [†]	69	78% [◇]	1328	36%* [†]	715	44% ^{†◇}	1643	56% ^{†‡}	1102	71% ^{†∞}	789	49% [†]	359	56% ^{†◇}	571	67% ^{†‡}	601	78% ^{†‡}
	did not buy	66	67%	31	73%	667	46%*	453	31% [◇]	1033	42% [^]	639	49%* [∞]	466	61%	221	47% [◇]	337	52%	348	63% [∞]

*Significantly different from the New Hampshire sample at the 90% confidence level.

† Significantly different from “did not buy” at the 90% confidence level.

◇ Significantly different from 2001 at the 90% confidence level.

^ Significantly different from 2002 at the 90% confidence level.

∞ Significantly different from 2003 at the 90% confidence level.

Table 7b
Purchased Products in Past 12 Months by
Aided Recognition of ENERGY STAR Label,
Additional States
(Base=All Respondents, 2004 only)

		NH		MA		NY		NJ		PA		OH		FL		TX		CA	
		n	% aided	n	% aided	n	% aided	n	% aided	n	% aided	n	% aided	n	% aided	n	% aided	n	% aided
Any appliance	bought	36	78%	37	86% [†]	164	77%	12	55%	11	71%	18	67%	14	37%*	18	72%	45	93%* [†]
	did not	64	76%	70	70%	344	74%	41	52%*	39	53%*	39	51%*	80	40%*	52	63%	145	73%
Any heating/ cooling	bought	8	76%	17	95% [†]	34	74%	9	50%	3	36%	6	67%	8	68% [†]	6	40%	18	84%
	did not	92	77%	90	71%	474	75%	44	53%*	47	59%*	51	54%*	86	36%*	64	67%	172	77%
Any home office equipment	bought	23	86%	39	76%	129	84% [†]	12	76% [†]	14	63%	10	100%* [†]	20	57%* [†]	19	93% [†]	49	75%
	did not	77	74%	68	73%	379	73%	41	45%*	36	55%*	47	46%*	74	35%*	71	55%*	141	78%
Any lighting	bought	21	86%	30	72%	90	75%	9	88% [†]	9	95% [†]	13	38%*	14	72% [†]	14	73%	35	74%
	did not	79	74%	77	75%	418	75%	44	47%*	41	45%*	44	60%	80	34%*	56	62%	155	78%
Any home electronics	bought	21	84%	21	79%	122	77%	15	76% [†]	11	87% [†]	22	53%*	22	45%*	18	68%	43	79%
	did not	79	75%	86	73%	386	75%	38	42%*	39	47%*	35	57%*	72	37%*	52	63%	147	77%
Any building product/new home	bought	26	82%	22	86%	82	85% [†]	10	48%*	8	49%	7	40%*	12	53%*	10	78%	19	96% [†]
	did not	74	75%	85	72%	426	73%	43	53%*	42	58%*	50	57%*	82	37%*	60	62%	171	75%
Any product	bought	69	78%	80	75%	319	81% [†]	31	64% [†]	33	66% [†]	36	52%*	50	52%* [†]	39	77% [†]	112	84% [†]
	did not	31	73%	27	73%	189	65%	22	39%*	17	36%*	21	60%	44	20%*	31	51%*	78	70%

* Significantly different from the New Hampshire sample at the 90% confidence level.

[†] Significantly different from “did not buy” at the 90% confidence level.

People in the U.S. as a whole who have both been shopping and not shopping for products in the past 12 months are less likely than those in New Hampshire to express *unaided* recognition (see Tables 8a and 8b). Results are similar between New Hampshire and other high publicity areas and several active states, with the exception of product shoppers, where NH respondents express lower recognition. However, the small number of people looking for homes in New Hampshire limits comparisons.

Table 8a
Have Been Shopping for Products in Past 12 Months by
Unaided Recognition of ENERGY STAR Label
(Base=All Respondents)

Shopped for Products/ Homes	NH		US						Other High Publicity Areas					
	2004		2002		2003		2004		2002		2003		2004	
	n	ES	n	ES	n	ES	n	ES	n	ES	n	ES	n	ES
Products														
Yes	65	48%	596	27%	1428	29% [†]	969	41% ^{†∞}	303	38% [†]	494	43% [†]	526	60% ^{†∞}
No/Don't know	35	46%	572	17%	1248	19%	772	30% ^{*∞}	277	27%	414	32%	423	39% [∞]
Homes														
Yes	4	49%	44	29%	112	41% [†]	79	65% ^{†∞}	15	24%	32	58% ^{†∅}	46	77% ^{†∞}
No/Don't know	96	47%	1124	21%	2564	23%	1662	35% ^{*∞}	565	32%	876	37% [∅]	903	48% [∞]

* Significantly different from the New Hampshire sample at the 90% confidence level.

† Significantly different from “no/don't know” at the 90% confidence level.

∅ Significantly different from 2002 at the 90% confidence level.

∞ Significantly different from 2003 at the 90% confidence level.

Table 8b
Have Been Shopping for Products in Past 12 Months by
Unaided Recognition of ENERGY STAR Label, Additional States
(Base=All Respondents, 2004 only)

Shopped for Products/ Homes	NH		MA		NY		NJ		PA		OH		FL		TX		CA	
	n	ES	n	ES	n	ES	n	ES	n	ES	n	ES	n	ES	n	ES	n	ES
Products																		
Yes	65	48%	70	66% ^{*†}	285	60% ^{*†}	28	52%	29	47% [†]	33	24% [*]	41	15% [*]	36	34%	94	61% [†]
No/Don't know	35	46%	37	39%	223	43%	25	61%	21	18% [*]	24	29%	53	9% [*]	34	33%	96	46%
Homes																		
Yes	4	49%	8	83% [†]	22	79% [†]	2	0% ^{*†}	2	0% [†]	2	0% ^{*†}	2	0% ^{*†}	4	80% [†]	9	84% [†]
No/Don't know	96	47%	99	51%	486	51%	51	60%	48	36% [*]	55	27% [*]	92	12% [*]	66	30%	181	52% [*]

*Significantly different from the New Hampshire sample at the 90% confidence level.

† Significantly different from “no/don't know” at the 90% confidence level.

Although New Hampshire shoppers express higher *aided* recognition than the U.S., we find no such trends when comparing to other high publicity states (Tables 9a and 9b). Aided awareness is similar between those NH respondents who shopped and those who did not.

It should be remembered that the range of products that can potentially carry the ENERGY STAR label is very broad, so even non-shoppers may eventually become buyers. Hence, by increasing ENERGY STAR recognition among non-shoppers and non-buyers, the New Hampshire utilities are still increasing recognition among *eventual* buyers.

Table 9a
Have Been Shopping for Products in Past 12 Months by
Aided Recognition of ENERGY STAR Label
(Base=All Respondents)

Shopped for Products/Homes	NH		US						Other High Publicity Areas					
	2004		2002		2003		2004		2002		2003		2004	
	n	ES	n	ES	n	ES	n	ES	n	ES	n	ES	n	ES
Products														
Yes	65	77%	596	45%	1428	58% [†]	969	71% ^{†∞}	303	56% [†]	494	67% ^{†∞}	526	79% ^{†∞}
No/Don't know	35	75%	572	33%	1248	43%	772	54% ^{*∞}	277	48%	414	55% [∞]	423	65% [∞]
Homes														
Yes	4	100% [†]	44	54%	112	63% [†]	79	80% ^{*†∞}	15	36%	32	60%	46	89% ^{*∞}
No/Don't know	96	76%	1124	38%	2564	51%	1662	62% ^{*∞}	565	53%	876	61% [∞]	903	71% ^{†∞}

*Significantly different from the New Hampshire sample at the 90% confidence level.

†Significantly different from "no/don't know" at the 90% confidence level.

∞Significantly different from 2002 at the 90% confidence level.

∞Significantly different from 2003 at the 90% confidence level.

Table 9b
Have Been Shopping for Products in Past 12 Months by
Aided Recognition of ENERGY STAR Label, Additional States
(Base=All Respondents, 2004 only)

Shopped for Products/Homes	NH		MA		NY		NJ		PA		OH		FL		TX		CA	
	n	ES	n	ES	n	ES	n	ES	n	ES	n	ES	n	ES	n	ES	n	ES
Products																		
Yes	65	77%	70	78%	285	82% [†]	28	62%	29	65%	33	54% [*]	41	47% ^{*†}	36	74% [†]	94	85% [†]
No/Don't know	35	75%	37	70%	223	66%	25	44% [*]	21	44% [*]	24	57%	53	30% [*]	34	55% [*]	96	71%
Homes																		
Yes	4	100% [†]	8	100% [†]	22	96% [†]	2	100% [†]	2	0% ^{*†}	2	45% [†]	2	23% [*]	4	81%	9	94% [†]
No/Don't know	96	76%	99	72%	486	74%	51	50% [*]	48	58% [*]	55	55% [*]	92	40% [*]	66	64%	181	77%

*Significantly different from the New Hampshire sample at the 90% confidence level.

†Significantly different from "no/don't know" at the 90% confidence level.

6. Influence and Rebates

Tables 10 and 11 show self-reported influence of the ENERGY STAR label on the decision to purchase an ENERGY STAR-labeled product in two ways: Table 10 is based only on those who say they have purchased ENERGY STAR-labeled products, and Table 11 is based on all respondents. While a higher proportion of 2004 NH respondents said the ENERGY STAR label very much or somewhat influenced their purchase (73%), the difference is not significant when compared to 2001 results (55%). In addition, the percentage of New Hampshire consumers who say that the label very much or somewhat influenced their decision to purchase a product is significantly higher than those in the U.S. (53%). There are, though, no sizable differences between New Hampshire and other high publicity areas (65%). Looking at individual states in Table 10b, the only significant difference exists between New Hampshire and several less active states (Ohio, Florida, and Texas), with more New Hampshire purchasers saying the label influenced them. Similar results were found for all respondents (Tables 11a and 11b).

Table 10a
Influence of ENERGY STAR Label on Purchase Decision
(Base=Purchasers of ENERGY STAR-Labeled Products)

Source	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	71	20	420	145	401	337	280	101	189	215
Very much	27%	26%	27%	20%	21%	26%	38%	30%	21%	34%
Somewhat	28%	45%	27%	25% [◊]	28%	27%*	31%*	26% [◊]	36%	31%
Slightly	23%	20%	17%	19%	14%	20%	12%	16%	14%	16%
Not at all	23%	0%	28%	31%	33%	25%	19%	25%	23%	18%
Don't know	0%	0%	0%	5%	5%	2%	0%	3%	4%	0%

*Very much or somewhat (combined) significantly different from the New Hampshire sample at the 90% confidence level.

[◊] Very much or somewhat (combined) significantly different from 2001 at the 90% confidence level.

[†] Very much or somewhat (combined) significantly different from 2002 at the 90% confidence level.

[∞] Very much or somewhat (combined) significantly different from 2003 at the 90% confidence level.

Table 10b
Influence of ENERGY STAR Label on Purchase Decision, Additional States
(Base=Purchasers of ENERGY STAR-Labeled Products, 2004 only)

	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	20	35	106	6	9	9	8	10	42
Very much	26%	32%	32%	82%	42%	21%	0%	5%	33%
Somewhat	45%	37%	32%	6%	43%	8%*	11%*	34%*	35%
Slightly	20%	21%	17%	12%	7%	24%	35%	6%	14%
Not at all	0%	11%	19%	0%	10%	48%	13%	55%	18%
Don't know	0%	0%	1%	0%	0%	0%	41%	0%	0%

*Very much or somewhat (combined) significantly different from the New Hampshire sample at the 90% confidence level.

Table 11a
Influence of ENERGY STAR Label on Purchase Decision
(Base=All Respondents)

Source	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	278	100	1997	1168	2676	1741	1256	580	908	949
Very much	7%	6%	5%	2%	3%	4%	10%	5%	5%	7%
Somewhat	7%	10%	5%*	3% [◊]	4% [†]	5%* [∞]	8%*	5% [◊]	8% [†]	6%
Slightly	6%	5%	3%	2%	2%	3%	3%	3%	3%	3%
Not at all	6%	2%	5%	3%	5%	4%	5%	4%	5%	4%
Don't know	0%	0%	0%	1%	1%	0%	0%	1%	1%	0%

*Very much or somewhat (combined) significantly different from the New Hampshire sample at the 90% confidence level.

[◊] Very much or somewhat (combined) significantly different from 2001 at the 90% confidence level.

[†] Very much or somewhat (combined) significantly different from 2002 at the 90% confidence level.

[∞] Very much or somewhat (combined) significantly different from 2003 at the 90% confidence level.

Table 11b
Influence of ENERGY STAR Label on Purchase Decision, Additional States
(Base=All Respondents, 2004 only)

	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	100	107	508	53	50	57	94	70	190
Very much	6%	7%	6%	9%	6%	3%	0%	1%	6%
Somewhat	10%	8%	6%	1%	6%	1%*	1%*	4%*	6%
Slightly	5%	5%	3%	1%	1%	4%	3%	1%	3%
Not at all	2%	2%	4%	0%	1%	8%	1%	7%	3%
Don't know	0%	0%	0%	0%	0%	0%	4%	0%	0%

*Very much or somewhat (combined) significantly different from the New Hampshire sample at the 90% confidence level.

Looking at the demographics of New Hampshire respondents who purchased ENERGY STAR products (Table 12), we find a few scattered differences that are statistically significant regarding the level of influence of the ENERGY STAR label. However, there are no consistent patterns that indicate any trends among the demographic segments.

For example, significantly fewer respondents that earn less than \$25k report being influenced by the ENERGY STAR label, while significantly more respondents that earn between \$50k-\$75k report being influenced. However, only 14% of those earning between \$75k-\$99k report being influenced and none of those earning over \$100k report being influenced. Thus, there are no consistent patterns that indicate that income is correlated with the level of influence.

As a reminder, due to low sample sizes in several demographic segments, influence levels that are substantially different from the overall New Hampshire results may not in fact result in a statistically significant difference.

Table 12
Influence of ENERGY STAR Label on Purchase Decision by Demographics
(Base=New Hampshire Respondents, 2004 only)

	n	Very much	Somewhat	Very much or somewhat
New Hampshire	100	6%	10%	16%
Age				
18-24	9	0%	6%	6%
25-34	9	13%	21%	34%
35-44	22	0%	6%	6%
45-54	28	0%	11%	11%
55-64	16	32%	25%	57%*
65 or over	16	3%	0%	3%*
Education				
Less than HS	5	0%	0%	0%*
Graduated HS	23	0%	7%	7%
Some college	39	14%	18%	32%*
College grad	22	9%	0%	9%
Grad or prof degree	11	4%	20%	24%
Gender				
Male	54	4%	10%	15%
Female	46	7%	9%	17%
Household Size				
1	19	11%	0%	11%
2	32	4%	20%	25%
3	18	9%	7%	16%
4	14	4%	6%	10%
5 or more	17	0%	4%	4%*
Household Income				
Under \$15K	7	0%	0%	0%*
\$15-25K	14	4%	0%	4%*
\$25-35K	6	5%	0%	5%
\$35-50K	25	0%	9%	9%
\$50-75K	26	11%	28%	39%*
\$75-99K	12	14%	0%	14%
\$100K+	5	0%	0%	0%*
Own/Rent Status				
Own	71	8%	13%	21%
Rent	26	2%	3%	4%*

*Very much or somewhat (combined) significantly different from the New Hampshire sample at the 90% confidence level.

New Hampshire consumers of ENERGY STAR-labeled products are more likely to report receiving rebates for their ENERGY STAR-labeled products than are consumers in the U.S. as a whole and at a similar rate to those in other high publicity areas (see Tables 13a through 14b). Note that this question may include ENERGY STAR products that are typically eligible for rebates (such as appliances and lighting products) as well as many other products that typically are not eligible for rebates.

The percentage of NH respondents receiving rebates has increased from 18% in 2001 to 27% in 2004. Compared to other states, the rebate rate in New Hampshire is roughly in the middle.

Table 13a
Received Rebates or Reduced-Rate Financing
(Base=Purchasers of ENERGY STAR-Labeled Products)

Source	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	64	20	376	143	397	333	249	99	188	212
Yes	18%	27%	20%	13% [◊]	14%	18%	29%*	18% [◊]	15%	27% [∞]

*Significantly different from the New Hampshire sample at the 90% confidence level.

[◊] Significantly different from 2001 at the 90% confidence level.

[†] Significantly different from 2002 at the 90% confidence level.

[∞] Significantly different from 2003 at the 90% confidence level.

Table 13b
Received Rebates or Reduced-Rate Financing,
Additional States
(Base=Purchasers of ENERGY STAR-Labeled Products, 2004 only)

	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	20	34	105	6	7	9	9	10	41
Yes	27%	41%	19%	53%	0%*	37%	0%*	25%	28%

*Significantly different from the New Hampshire sample at the 90% confidence level.

Table 14a
Received Rebates or Reduced-Rate Financing
(Base=All Respondents)

Source	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	278	100	1997	1168	2676	1741	1256	580	908	949
Yes	4%	6%	3%	1% [◊]	2% [†]	3% [∞]	7%*	3% [◊]	3%	5% [∞]

*Significantly different from the New Hampshire sample at the 90% confidence level.

[◊] Very or somewhat (combined) significantly different from 2001 at the 90% confidence level.

[†] Very or somewhat (combined) significantly different from 2002 at the 90% confidence level.

[∞] Very much or somewhat (combined) significantly different from 2003 at the 90% confidence level.

Table 14b
Received Rebates or Reduced-Rate Financing, Additional States
(Base=All Respondents, 2004 only)

	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	100	107	508	53	50	57	94	70	190
Yes	6%	9%	4%	6%	0%	6%	0%	3%	5%

*Significantly different from the New Hampshire sample at the 90% confidence level.

Those respondents who reported receiving rebates were asked if they would have purchased the product without the rebates. The percentage of respondents who said they were somewhat likely or very likely to have done so was significantly lower in New Hampshire in 2004 than in 2001 as well as compared to the U.S. as a whole, High-Publicity areas, and several of the comparison states. However, note the very small sample sizes for New Hampshire (12 in 2001 and 5 in 2004).

Table 15
Likelihood to Have Purchased ENERGY STAR-Labeled Product
In Absence of Rebate or Reduced-Rate Financing
(Base=Respondents Who Receive Rebates or Reduced-Rate Financing on
ENERGY STAR-Labeled Products)

Source	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	12	5	88	32	62	69	68	29	33	51
Very likely	42%	21%	34%	45%	51%	52%	37%	33%	65%	51%
Somewhat likely	42%	0% [◇]	32%	47% [◇]	15% [†]	28% ^{*∞}	31%	57% [◇]	12%	38% [*]
Slightly likely	17%	79%	26%	2%	24%	13%	21%	2%	4%	6%
Not at all likely	0%	0%	8%	6%	10%	4%	12%	7%	19%	4%
Don't know	0%	0%	0%	0%	0%	3%	0%	1%	0%	0%

* Significantly different from New Hampshire at the 90% confidence level.

◇ Very much or somewhat (combined) significantly different from 2001 at the 90% confidence level.

† Very or somewhat (combined) significantly different from 2002 at the 90% confidence level.

∞ Very or somewhat (combined) significantly different from 2003 at the 90% confidence level.

Table 16a
Likelihood to Have Purchased ENERGY STAR-Labeled Product
In Absence of Rebate or Reduced-Rate Financing
(Base=All Respondents)

Source	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	278	100	1997	1168	2676	1741	1256	580	908	949
Very likely	2%	1%	1%	1%	1%	2%	2%	1%	2%	3%
Somewhat likely	2%	0% [◇]	1%	1%	0% [†]	1%* [∞]	2%	2%	0%	2%* [∞]
Slightly likely	1%	5%	1%	0%	1%	0%	1%	0%	0%	0%
Not at all likely	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%
Don't know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

*Very or somewhat likely (combined) significantly different from the New Hampshire sample at the 90% confidence level.

[◇] Very much or somewhat (combined) significantly different from 2001 at the 90% confidence level.

[†] Very or somewhat (combined) significantly different from 2002 at the 90% confidence level.

[∞] Very or somewhat (combined) significantly different from 2003 at the 90% confidence level.

Table 16b
Likelihood to Have Purchased ENERGY STAR-Labeled Product
In Absence of Rebate or Reduced-Rate Financing, Additional States
(Base=All Respondents, 2004 only)

	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	100	107	508	53	50	57	94	70	190
Very likely	1%	4%	2%	1%	0%	5%	0%	2%	2%
Somewhat likely	0%	4%*	2%*	4%	0%	1%	0%	0%	1%
Slightly likely	5%	0%	0%	0%	0%	0%	0%	1%	1%
Not at all likely	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know	0%	0%	0%	0%	0%	0%	0%	0%	0%

*Very or somewhat likely (combined) significantly different from the New Hampshire sample at the 90% confidence level.

7. Loyalty to ENERGY STAR

Loyalty to ENERGY STAR, expressed as likelihood to recommend it to a friend, has not significantly changed among New Hampshire consumers since 2001. In 2004, 74% of purchasers of ENERGY STAR labeled products are very likely or somewhat likely to recommend these products to a friend, up slightly from 71% in 2001. Among New Hampshire consumers who have bought an ENERGY STAR-labeled product, loyalty is not significantly higher or lower than among people in other areas who have bought such products (Tables 17a and 17b). Similar results are found for loyalty among all respondents (Tables 18a and 18b).

Table 17a
Likelihood to Recommend ENERGY STAR-Labeled Products to a Friend
(Base=Purchasers of ENERGY STAR-Labeled Products)

Source	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	62	20	370	145	398	335	254	101	188	213
Very likely	32%	36%	42%	30%	28%	36%	49%	40%	34%	47%
Somewhat likely	39%	38%	29%	18% [◇]	24%	29% [∞]	32%	27% [◇]	23% [†]	25% [∞]
Slightly likely	18%	16%	16%	17%	13%	17%	8%	5%	16%	11%
Not at all likely	11%	7%	14%	11%	14%	8%	12%	8%	9%	8%
Don't know	0%	3%	0%	23%	20%	11%	0%	20%	18%	9%

*Very or somewhat likely (combined) significantly different from the New Hampshire sample at the 90% confidence level.

[◇] Very much or somewhat (combined) significantly different from 2001 at the 90% confidence level.

[†] Very or somewhat (combined) significantly different from 2002 at the 90% confidence level.

[∞] Very or somewhat (combined) significantly different from 2003 at the 90% confidence level.

Table 17b
Likelihood to Recommend ENERGY STAR-Labeled Products to a Friend,
Additional States
(Base=Purchasers of ENERGY STAR-Labeled Products, 2004 only)

	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	20	34	105	6	7	9	9	10	41
Very likely	36%	39%	38%	88%	0%	28%	48%	5%	48%
Somewhat likely	38%	33%	31%	0%	45%	44%	40%	41%	30%
Slightly likely	16%	13%	11%	0%	51%	24%	13%	17%	8%
Not at all likely	7%	5%	7%	12%	4%	3%	0%	21%	5%
Don't know	3%	11%	14%	0%	0%	0%	0%	17%	8%

*Very or somewhat likely (combined) significantly different from the New Hampshire sample at the 90% confidence level.

Table 18a
Likelihood to Recommend ENERGY STAR-Labeled Products to a Friend
(Base=All Respondents)

Source	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	278	100	1997	1168	2676	1741	1256	580	908	949
Very likely	7%	8%	7%	3%	4%	6%	11%	7%	7%	9%
Somewhat likely	9%	8%	5%*	2% [◇]	4% [†]	5%* [∞]	8%	5% [◇]	5%	5%* [∞]
Slightly likely	4%	4%	3%	2%	2%	3%	2%	1%	3%	2%
Not at all likely	3%	2%	2%	1%	2%	1%	3%	2%	2%	2%
Don't know	0%	1%	0%	3%	3%	2%	0%	4%	4%	2%

*Very or somewhat likely (combined) significantly different from the New Hampshire sample at the 90% confidence level.

[◇] Very much or somewhat (combined) significantly different from 2001 at the 90% confidence level.

[†] Very much or somewhat (combined) significantly different from 2002 at the 90% confidence level.

[∞] Very or somewhat (combined) significantly different from 2003 at the 90% confidence level.

Table 18b
Likelihood to Recommend ENERGY STAR-Labeled Products to a Friend,
Additional States
(Base=All Respondents, 2004 only)

	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	100	107	508	53	50	57	94	70	190
Very likely	8%	8%	7%	9%	0%	5%	5%	1%	9%
Somewhat likely	8%	7%	6%	0%	7%*	7%	4%	5%*	5%
Slightly likely	4%	3%	2%	0%	8%	4%	1%	2%	2%
Not at all likely	2%	1%	1%	1%	1%	1%	0%	3%	1%
Don't know	1%	2%	3%	0%	0%	0%	0%	2%	2%

*Very or somewhat likely (combined) significantly different from the New Hampshire sample at the 90% confidence level.

8. Sources of Information

The Web TV survey asked respondents where they would look for information about heating and cooling products and for home appliances, lighting, and home electronics. As shown in Table 19a and Figure 10, when searching for information on heating and cooling products, New Hampshire residents most commonly rely on advice from friends/neighbors/relatives/coworkers, followed by advice from salespeople, Consumer magazines, and the internet. Significantly fewer NH respondents cited *Consumer Reports* or the Internet as a source of information in 2004 than in 2001; note that this may be influenced by the shift in methodology from mail survey in 2001 to WebTV in 2004. This shift may affect the number of items a respondent is likely to mark for a multiple response question.

Patterns are generally similar when comparing New Hampshire to other individual states (Table 19b).

Table 19a
Likely Sources of Information for Heating and Cooling Products
(Base=All Respondents)

	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	278	100	1997	1168	2676	1741	1256	580	908	949
Consumer Reports and other product-oriented magazines	53%	32% [◇]	48%	39% [◇]	36% [∞]	40%*	51%	40% [◇]	40%	40%
Other magazines	13%	8%	12%	9% [◇]	7% [∞]	6%	14%	6% [◇]	9% [∞]	9%
Newspapers	16%	14%	30%*	14% [◇]	14%	13%	29%*	13% [◇]	15%	14%
Radio	8%	8%	12%*	7% [◇]	8%	6% [†]	9%	8%	7%	6%
Television	19%	21%	30%*	23% [◇]	19% [∞]	17% [†]	27%*	21% [◇]	21%	16% [†]
Electric or gas utility	17%	18%	24%*	19% [◇]	21%	22%	28%*	21% [◇]	24%	24%
Advice from retailers or salespersons	41%	40%	33%*	38% [◇]	34% [∞]	36%	33%*	34%	32%	36% [†]
Advice from contractors	33%	26%	27%*	24% [◇]	23%	24%	25%*	28%	21% [∞]	22%
Advice from a friend, neighbor, relative, or co-worker	54%	50%	57%	53% [◇]	52%	48% [†]	53%	51%	52%	44% [†]
Internet	41%	30% [◇]	34%*	71% [◇]	31% [∞]	31%	35%*	27% [◇]	34% [∞]	31%
Other	2%	2%	4%*	2% [◇]	2%	2%	4%*	1% [◇]	1%	2% [†]
Don't know	4%	8%	5%	13% [◇]	12%	15%* [†]	6%	16% [◇]	12% [∞]	19%* [†]

*Significantly different from the New Hampshire sample at the 90% confidence level.

[◇] Significantly different from 2001 at the 90% confidence level.

[∞] Significantly different from 2002 at the 90% confidence level.

[†] Significantly different from 2003 at the 90% confidence level.

Figure 10: Likely Sources of Information for Heating and Cooling Products, New Hampshire 2004

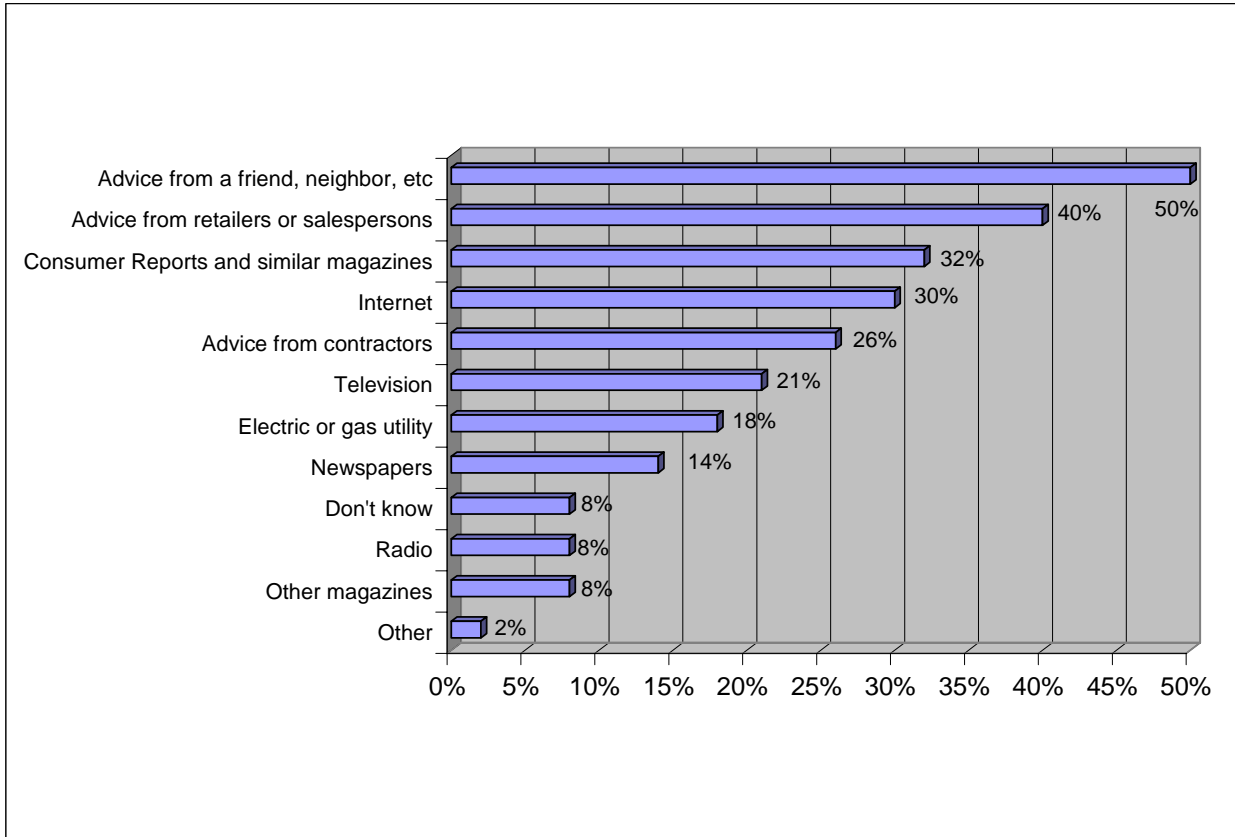


Table 19b
Likely Sources of Information
Heating and Cooling Products, Additional States
(Base=All Respondents, 2004 only)

	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	100	107	508	53	50	57	94	70	190
Consumer Reports and other product-oriented magazines	32%	33%	45%*	42%	47%*	37%	30%	43%	38%
Other magazines	8%	4%	13%	11%	9%	1%*	5%	2%*	6%
Newspapers	14%	7%	17%	15%	15%	11%	20%	12%	16%
Radio	8%	1%*	9%	2%*	11%	2%*	7%	1%*	8%
Television	21%	10%*	21%	13%	23%	23%	20%	18%	17%
Electric or gas utility	18%	17%	20%	15%	20%	20%	18%	27%	27%*
Advice from retailers or salespersons	40%	37%	35%	25%*	39%	39%	32%	33%	35%
Advice from contractors	26%	21%	24%	18%	34%	35%	15%*	21%	21%
Advice from a friend, neighbor, relative, or co-worker	50%	41%	49%	42%	38%	37%	44%	43%	39%*
Internet	30%	25%	32%	22%	31%	26%	31%	30%	36%
Other	2%	3%	2%	2%	6%	5%	2%	0%	1%
Don't know	8%	25%*	13%	16%	4%	16%	21%*	16%	20%*

*Significantly different from the New Hampshire sample at the 90% confidence level.

In all regions, the most common sources of information for appliances, lighting, and electronic products are advice from a friend/neighbor/relative/coworker, followed to varying levels by *Consumer Reports* and other product-oriented magazines, the Internet, and advice from retailers or salespersons. Again, significantly fewer NH respondents cited *Consumer Reports* or the Internet as a source of information in 2004 than in 2001; note that this may be influenced by the shift in methodology from mail survey in 2001 to WebTV in 2004. This shift may affect the number of items a respondent is likely to mark for a multiple response question.

Table 20a
Likely Sources of Information for Home Appliances/Lighting/Home Electronics (Base=All Respondents)

	NH		US				Other High Publicity Areas			
	2001	2004	2001	2002	2003	2004	2001	2002	2003	2004
n	278	100	1997	1168	2676	1741	1256	580	908	949
Consumer Reports and other product-oriented magazines	55%	36% [◇]	48%*	44% [◇]	38% [∞]	41% [†]	52% [◇]	46% [◇]	44%	42%
Other magazines	18%	14%	16%	11% [◇]	9% [∞]	12% [†]	18% [◇]	10% [◇]	11%	13%
Newspapers	18%	19%	31%*	19% [◇]	18%	15% [†]	31%* [◇]	15% [◇]	18%	15% [†]
Radio	8%	7%	11%*	6% [◇]	8% [∞]	6% [†]	7%	8%	8%	7%
Television	18%	26%	27%*	25%	23%	21%	26%*	24%	23%	18%* [†]
Electric or gas utility	12%	13%	17%*	12% [◇]	12%	14% [†]	22%* [◇]	14% [◇]	14%	18% [†]
Advice from retailers or salespersons	47%	44%	36%*	41% [◇]	41%	41%	37%*	39%	38%	39%
Advice from contractors	23%	19%	19%	15% [◇]	15%	16%	18%*	18%	16%	15%
Advice from a friend, neighbor, relative, or co-worker	56%	57%	59%	55% [◇]	57%	51% [†]	54%	57%	57%	50% [†]
Internet	40%	25% [◇]	34%*	26% [◇]	30% [∞]	28%	35% [◇]	24% [◇]	31% [∞]	27% [†]
Other	1%	2%	4%*	2% [◇]	2%	2%	3%*	2%	2%	1% [†]
Don't know	3%	11% [◇]	4%	11% [◇]	11%	14% [†]	6%*	8%	11% [∞]	17%* [†]

*Significantly different from the New Hampshire sample at the 90% confidence level.

[◇] Significantly different from 2001 at the 90% confidence level.

[∞] Significantly different from 2002 at the 90% confidence level.

[†] Significantly different from 2003 at the 90% confidence level.

Figure 11: Likely Sources of Information for Home Appliances/Lighting/Home Electronics, New Hampshire 2004

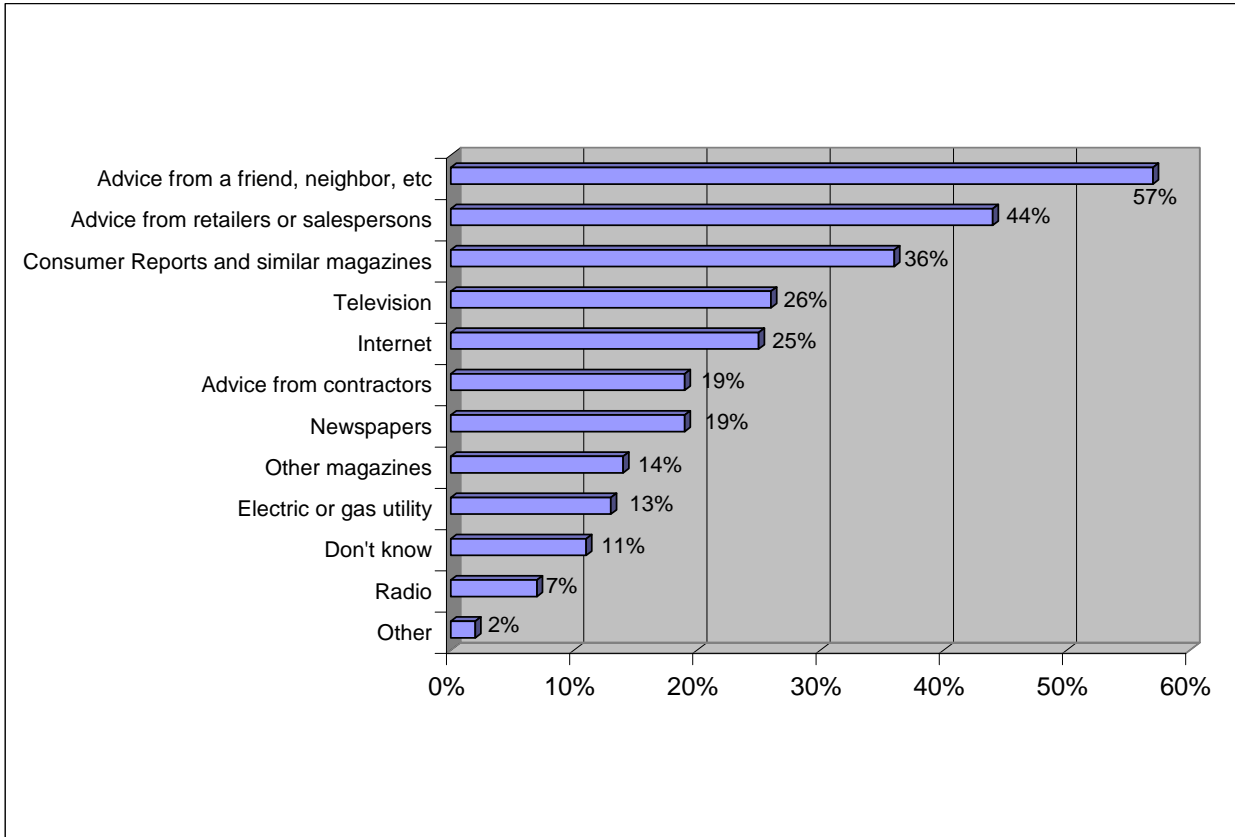


Table 20b
Likely Sources of Information
Home Appliances/Lighting/Home Electronics, Additional States
(Base=All Respondents, 2004 only)

	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	100	107	508	53	50	57	94	70	190
Consumer Reports and other product-oriented magazines	36%	38%	46%	44%	47%	31%	33%	50%	39%
Other magazines	14%	11%	10%	16%	19%	2%	7%	11%	13%
Newspapers	19%	10%	19%	18%	22%	14%	18%	11%	16%
Radio	7%	8%	8%	0%	7%	2%	7%	6%	10%
Television	26%	14%	25%	14%	23%	19%	31%	23%	20%
Electric or gas utility	13%	13%	12%	10%	15%	9%	12%	14%	23%
Advice from retailers or salespersons	44%	43%	37%	36%	47%	43%	29%	47%	38%
Advice from contractors	19%	18%	15%	9%	20%	24%	2%	16%	17%
Advice from a friend, neighbor, relative, or co-worker	57%	55%	54%	44%	53%	53%	40%	53%	46%
Internet	25%	20%	25%	19%	28%	23%	25%	30%	31%
Other	2%	3%	1%	0%	0%	0%	2%	1%	1%
Don't know	11%	16%	10%	19%	4%	4%	21%	7%	17%

*Significantly different from the New Hampshire sample at the 90% confidence level.

Tables 21a through 21c display the websites likely to be visited by respondents who said they were likely to use the internet as a source of information. In general, consumer organizations websites received the highest response (cited by roughly 20% of respondents) followed by manufacturer websites and retailer websites. In New Hampshire, utility websites were mentioned by 3%-4% of respondents, lower than in the U.S. as whole and other high publicity areas.

Table 21a
Internet Websites Visited
(Base=All Respondents, 2004 Only)

	Heating & Cooling Products			Home Appliances/ Lighting/Home Electronics		
	NH	US	Other High Publicity Areas	NH	US	Other High Publicity Areas
n	100	1741	949	100	1741	949
Local utility website	3%	10%*	12%*	4%	7%	9%*
State or Federal government website	3%	8%*	10%*	3%	5%	6%
Product manufacturer website	18%	22%	18%	16%	19%	16%
Retailer website	12%	19%*	11%	14%	13%	13%
Consumer Organization website	18%	21%	21%	18%	19%	20%
Other	4%	1%	2%	3%	2%	2%

*Significantly different from the New Hampshire sample at the 90% confidence level.

Table 21b
Internet Websites Likely to Visit for
Heating & Cooling Products, Additional States
(Base=All Respondents, 2004 Only)

	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	100	107	508	53	50	57	94	70	190
Local utility website	3%	5%	9%*	7%	4%	9%	7%	7%	15%*
State or Federal government website	3%	6%	9%*	9%	6%	7%	7%	3%	12%*
Product manufacturer website	18%	12%	18%	14%	28%	23%	20%	28%	20%
Retailer website	12%	10%	10%	6%	12%	8%	12%	20%	15%
Consumer Organization website	18%	21%	24%	16%	22%	13%	22%	23%	22%
Other	4%	1%	2%	4%	1%	0%*	1%	0%*	1%

*Significantly different from the New Hampshire sample at the 90% confidence level.

Table 21c
Internet Websites Likely to Visit for
Home Appliances/Lighting/Home Electronics, Additional States
(Base=All Respondents, 2004 Only)

	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	100	107	508	53	50	57	94	70	190
Local utility website	4%	4%	5%	10%	6%	7%	5%	5%	11%*
State or Federal government website	3%	3%	5%	8%	7%	2%	2%	1%	8%*
Product manufacturer website	16%	15%	18%	10%	27%	12%	13%	27%*	17%
Retailer website	14%	13%	12%	6%*	17%	11%	7%	20%	15%
Consumer Organization website	18%	18%	19%	15%	21%	9%*	16%	20%	19%
Other	3%	2%	0%*	4%	0%*	0%*	1%	0%*	2%

*Significantly different from the New Hampshire sample at the 90% confidence level.

9. Attitudes toward ENERGY STAR Products

A new set of questions in 2004 asks respondents how they view ENERGY STAR-labeled products. Respondents were asked how strongly they agreed or disagreed with the following six statements regarding ENERGY STAR products:

- Products with the ENERGY STAR label have fewer features than products without the label
- Products with the ENERGY STAR label are higher quality than those without the label
- Products with the ENERGY STAR label don't save any more energy than other new products
- Products with the ENERGY STAR label cost less to use than products without the label
- The U.S. government gives the ENERGY STAR label to products that meet energy efficiency guidelines
- Products with the ENERGY STAR label are better for the environment than products without the label

New Hampshire residents generally agreed with the expected response for the statement (i.e., agreed with a positive statement regarding ENERGY STAR products or disagreed with a negative statement). In addition, compared to the U.S. as a whole and other high publicity regions, significantly more New Hampshire residents agreed that ENERGY STAR products cost less to use and are better for the environment. In addition, significantly more New Hampshire residents than U.S. residents agreed that ENERGY STAR products meet energy efficiency guidelines. In comparison to other states, the same general trends hold true as listed above.

The three statements where NH respondents show significantly more agreement than the U.S. can be considered as “core” features of ENERGY STAR products (costs less to use, are better for the environment, and meets energy efficiency guidelines), reinforcing the finding that NH respondents appear to have a clear understanding of the ENERGY STAR label.

Table 22a
Agreement with Statements Concerning ENERGY STAR Products
(Base=All Respondents, 2004 Only)

	NH	US	Other High Publicity Areas
n	100	1741	949
Products with the ENERGY STAR label have fewer features than products without the label			
Strongly agree	2%	1%	2%
Somewhat agree	3%	3%	4%
Neither	51%	69%	62%
Somewhat disagree	14%	14%	17%
Strongly disagree	30%	12%	14%
Products with the ENERGY STAR label are higher quality than those without the label			
Strongly agree	5%	5%	7%
Somewhat agree	24%	18%	19%
Neither	56%	68%	63%
Somewhat disagree	4%	6%	8%
Strongly disagree	10%	2%	2%
Products with the ENERGY STAR label don't save any more energy than other new products			
Strongly agree	4%	2%	2%
Somewhat agree	2%	4%	5%
Neither	31%	53%	42%
Somewhat disagree	28%	27%	29%
Strongly disagree	34%	14%	19%
Products with the ENERGY STAR label cost less to use than products without the label			
Strongly agree	24%	13%	17%
Somewhat agree	34%	23%*	27%*
Neither	36%	52%	44%
Somewhat disagree	5%	7%	7%
Strongly disagree	2%	3%	3%
The U.S. government gives the ENERGY STAR label to products that meet energy efficiency guidelines			
Strongly agree	20%	15%	15%
Somewhat agree	27%	22%*	28%
Neither	44%	54%	46%
Somewhat disagree	3%	4%	4%
Strongly disagree	7%	3%	5%
Products with the ENERGY STAR label are better for the environment than products without the label			
Strongly agree	27%	14%	19%
Somewhat agree	30%	27%*	30%*
Neither	33%	51%	42%
Somewhat disagree	7%	5%	5%
Strongly disagree	2%	2%	3%

*Strongly agree/somewhat agree (combined) significantly different from the New Hampshire sample at the 90% confidence level.

Table 22b
Agreement with Statements Concerning ENERGY STAR Products,
Additional States
(Base=All Respondents, 2004 only)

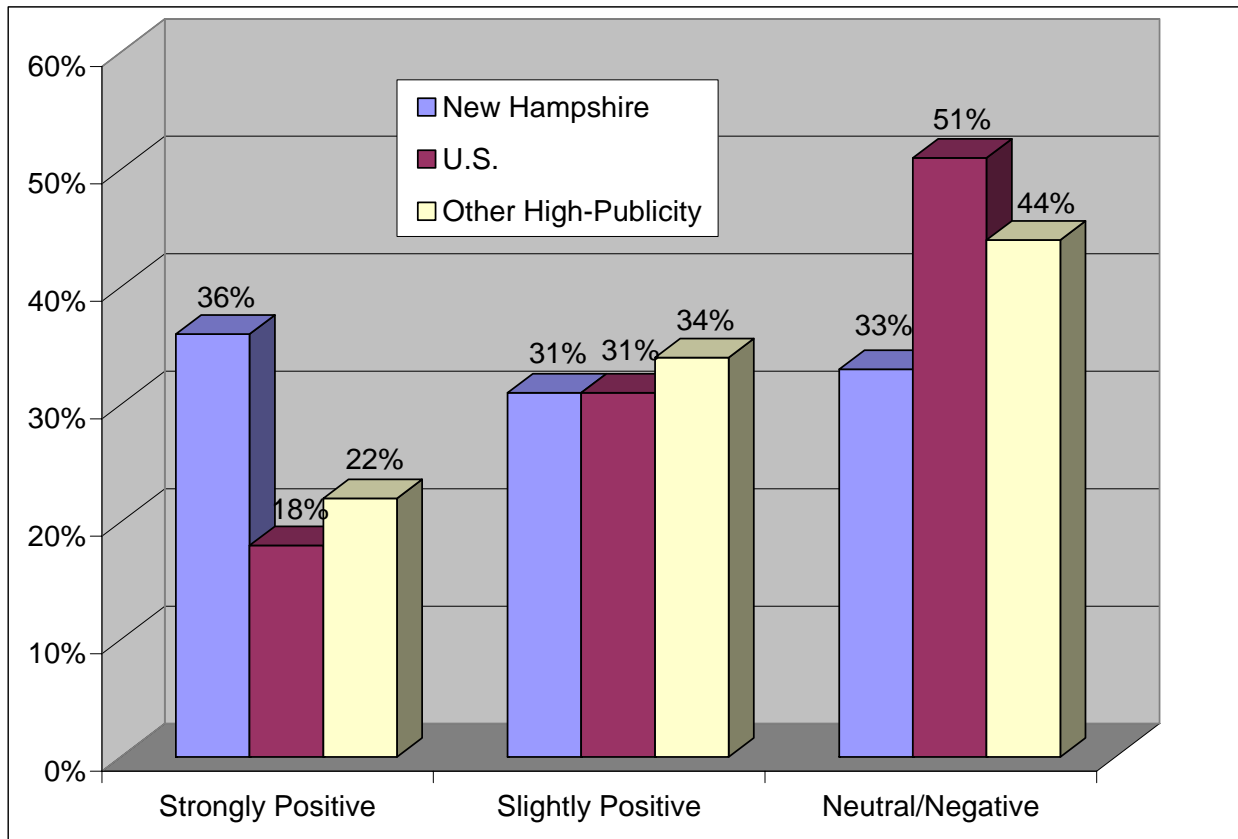
	NH	MA	NY	NJ	PA	OH	FL	TX	CA
n	100	107	508	53	50	57	94	70	190
Products with the ENERGY STAR label have fewer features than products without the label									
Strongly agree	2%	0%	2%	0%	0%	0%	1%	0%	3%
Somewhat agree	3%	2%	7%	4%	0%*	3%	1%	1%	3%
Neither	51%	60%	63%	60%	79%	66%	70%	74%	62%
Somewhat disagree	14%	20%	17%	14%	11%	13%	14%	7%	17%
Strongly disagree	30%	18%	10%	15%	10%	17%	9%	17%	14%
Products with the ENERGY STAR label are higher quality than those without the label									
Strongly agree	5%	7%	5%	9%	7%	5%	1%	7%	8%
Somewhat agree	24%	28%	22%	11%	13%	22%	18%	10%*	17%
Neither	56%	54%	64%	65%	66%	69%	66%	80%	66%
Somewhat disagree	4%	9%	6%	9%	13%	3%	1%	2%	6%
Strongly disagree	10%	1%	1%	0%	1%	0%	8%	0%	3%
Products with the ENERGY STAR label don't save any more energy than other new products									
Strongly agree	4%	2%	1%	2%	0%	0%	1%	2%	3%
Somewhat agree	2%	1%	5%	0%	2%	4%	2%	2%	6%
Neither	31%	42%	42%	43%	53%	63%	53%	60%	42%
Somewhat disagree	28%	31%	35%	29%	37%	15%	26%	24%	26%
Strongly disagree	34%	24%	15%	19%	9%	17%	13%	11%	21%
Products with the ENERGY STAR label cost less to use than products without the label									
Strongly agree	24%	17%	17%	10%	7%	13%	13%	17%	17%
Somewhat agree	34%	28%*	32%*	29%*	33%*	9%*	14%*	17%*	30%*
Neither	36%	46%	42%	35%	49%	66%	58%	59%	43%
Somewhat disagree	5%	7%	5%	14%	4%	11%	6%	5%	7%
Strongly disagree	2%	2%	2%	6%	7%	0%	3%	1%	3%
The U.S. government gives the ENERGY STAR label to products that meet energy efficiency guidelines									
Strongly agree	20%	20%	15%	13%	13%	26%	19%	13%	15%
Somewhat agree	27%	25%	34%	18%*	27%	7%*	19%	15%*	29%
Neither	44%	44%	43%	46%	55%	65%	48%	60%	48%
Somewhat disagree	3%	4%	4%	10%	4%	1%	5%	10%	4%
Strongly disagree	7%	7%	3%	6%	0%	0%	3%	1%	3%
Products with the ENERGY STAR label are better for the environment than products without the label									
Strongly agree	27%	24%	20%	18%	10%	15%	6%	17%	18%
Somewhat agree	30%	29%	34%	23%*	31%*	19%*	28%*	21%*	31%
Neither	33%	39%	41%	45%	53%	55%	49%	56%	42%
Somewhat disagree	7%	3%	2%	5%	6%	4%	4%	5%	7%
Strongly disagree	2%	4%	2%	2%	1%	6%	8%	0%	2%

*Strongly agree/somewhat agree (combined) significantly different from the New Hampshire sample at the 90% confidence level.

An overall attitude index was constructed from the level of agreement to the six statements, where each respondent was rated on a scale of five to thirty. For the four “positive” statements where agreement was expected, responses were scored from 5 for “strongly agree” to 1 for “strongly disagree.” The reverse scores were given to the two “negative” statements, where disagreement was expected response.

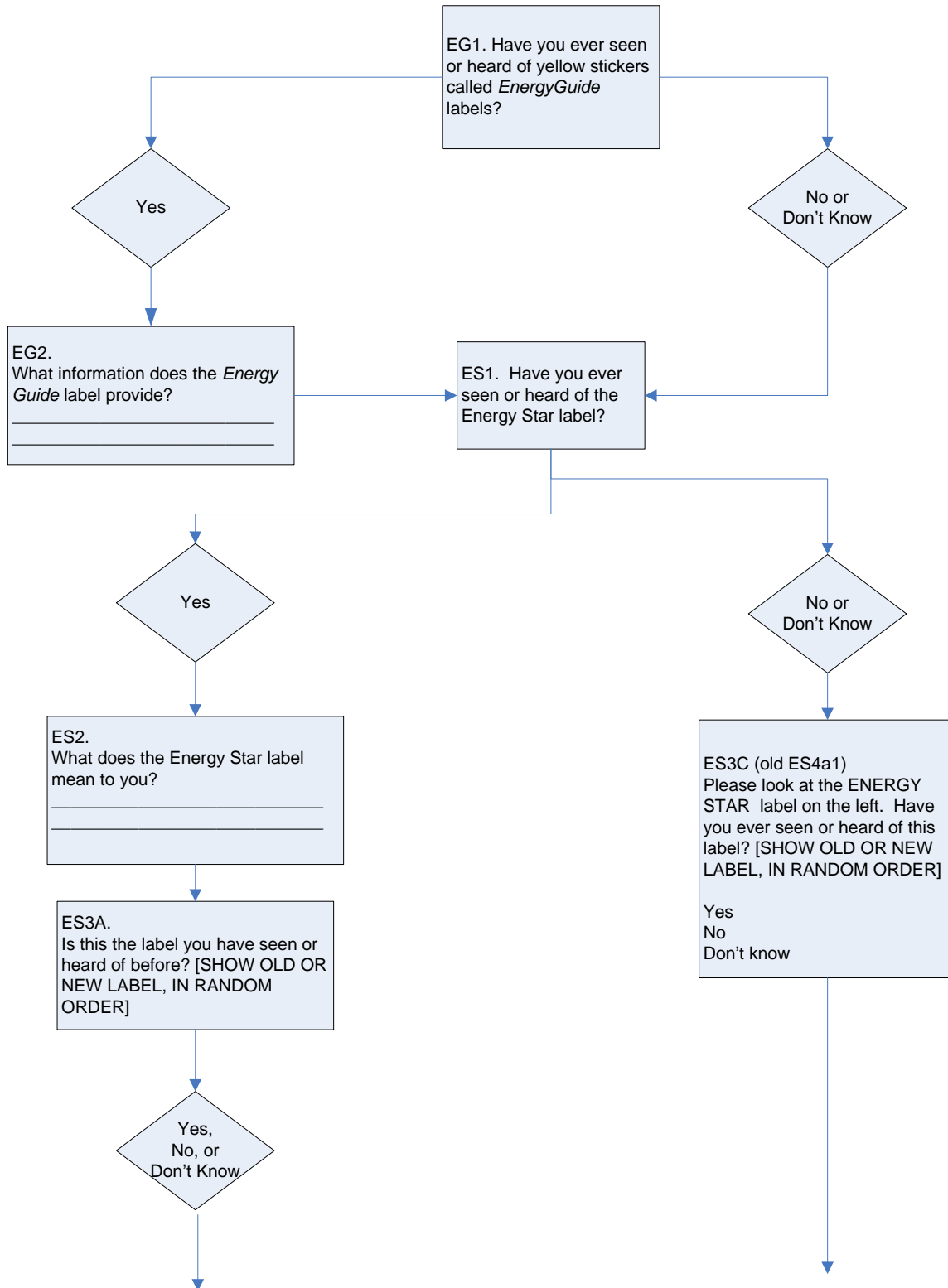
Figure 6 displays the results of this analysis, where respondents who scored 24 or higher received “strongly positive,” those who scored between 19 and 23 received “slightly positive,” and those who scored 18 or less received “neutral/negative.” Thirty six percent of New Hampshire respondents scored strongly positive, compared to only 18% of all respondents and 22% of High publicity Respondents. These results reinforce the finding that more NH customers appear to have positive attitudes towards ENERGY STAR products than other respondents.

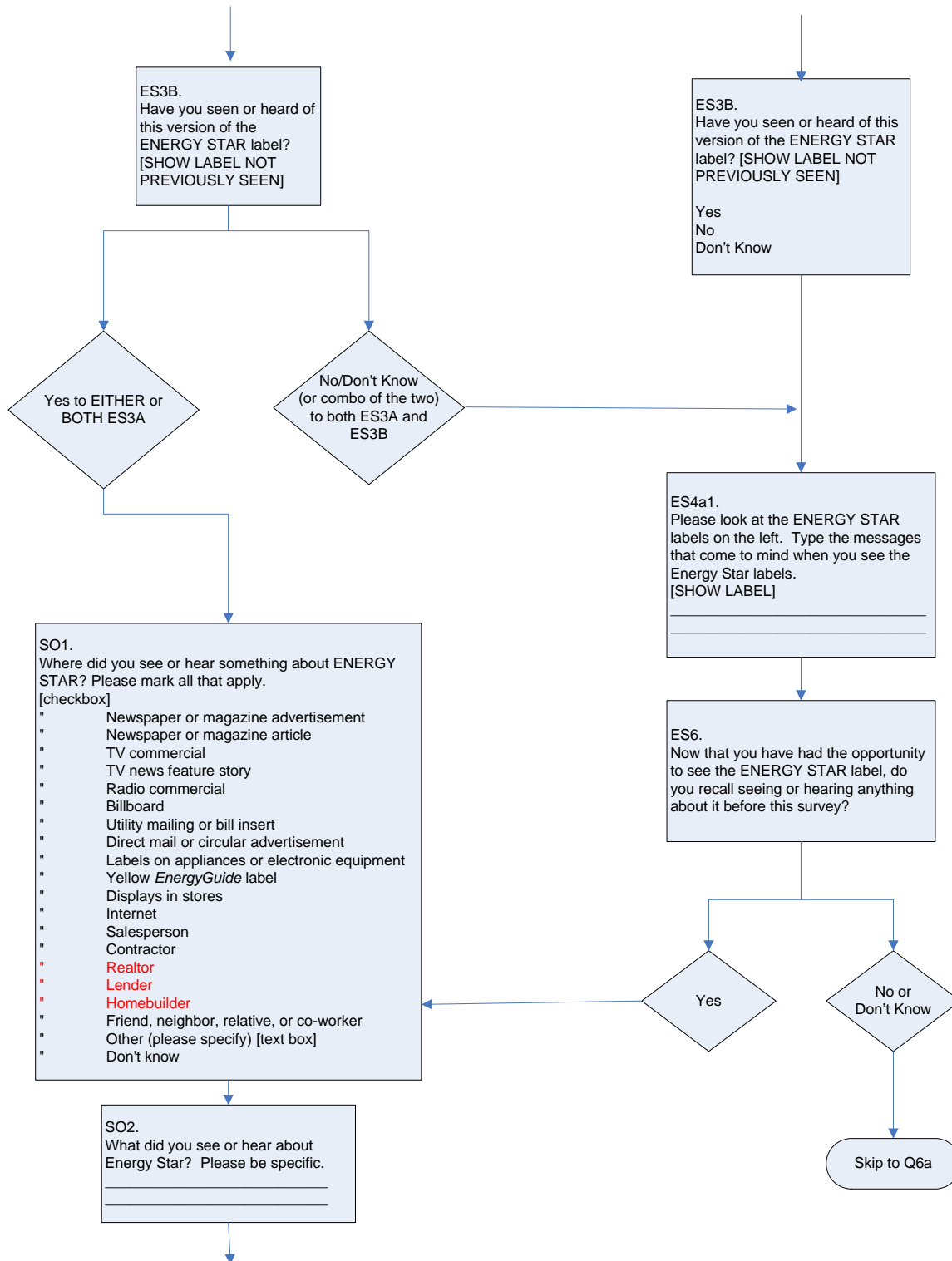
Figure 12: Overall Index of Attitudes towards ENERGY STAR products, 2004



Appendix A: Web TV Survey

2004 CEE ENERGY STAR® Survey Flowchart
August 20, 2004





Q5(a). Now we're going to ask you about several groups of products. As you review the list, please select each of the products, product literature, or packaging on which you have seen the ENERGY STAR label.

<u>Heating and Cooling Products</u>	<u>Home Office Equipment</u>
Central air conditioner	Computer or monitor
Furnace or boiler	Computer printer
Heat pump	Copying machine
Thermostat	Fax machine
Room air conditioner	Scanner

None of these products

Q5(b). Please continue reviewing the lists of products below, and select each of the products, product literature, or packaging on which you have seen the ENERGY STAR label.

<u>Home Appliances/Lighting</u>	<u>Home Electronics</u>
Dishwasher	Television
Refrigerator	VCR
Lighting fixture	Audio product
Washing machine	
Compact fluorescent light bulb	
Microwave oven	

None of these products

Q5(c). Finally, please review the last of the product lists below and select each of the products, product literature, or packaging on which you have seen the ENERGY STAR label.

<u>Building Materials</u>	<u>Buildings</u>
Window	Newly built home
Door	
Skylight	
Insulation	
Roofing material	

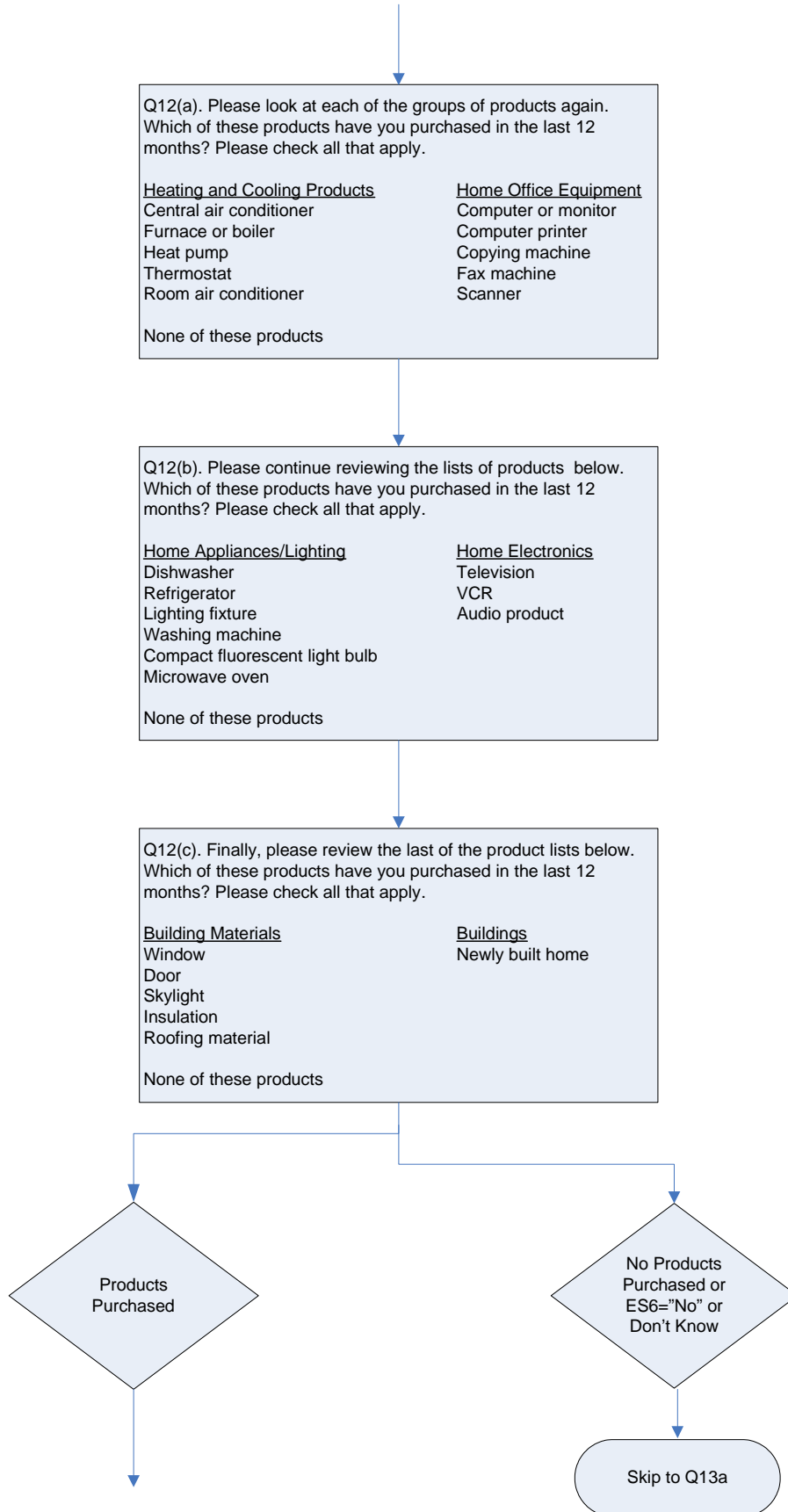
Q6a
Have you or someone else in your household been shopping in a store in the last 12 months for any of the products listed below?

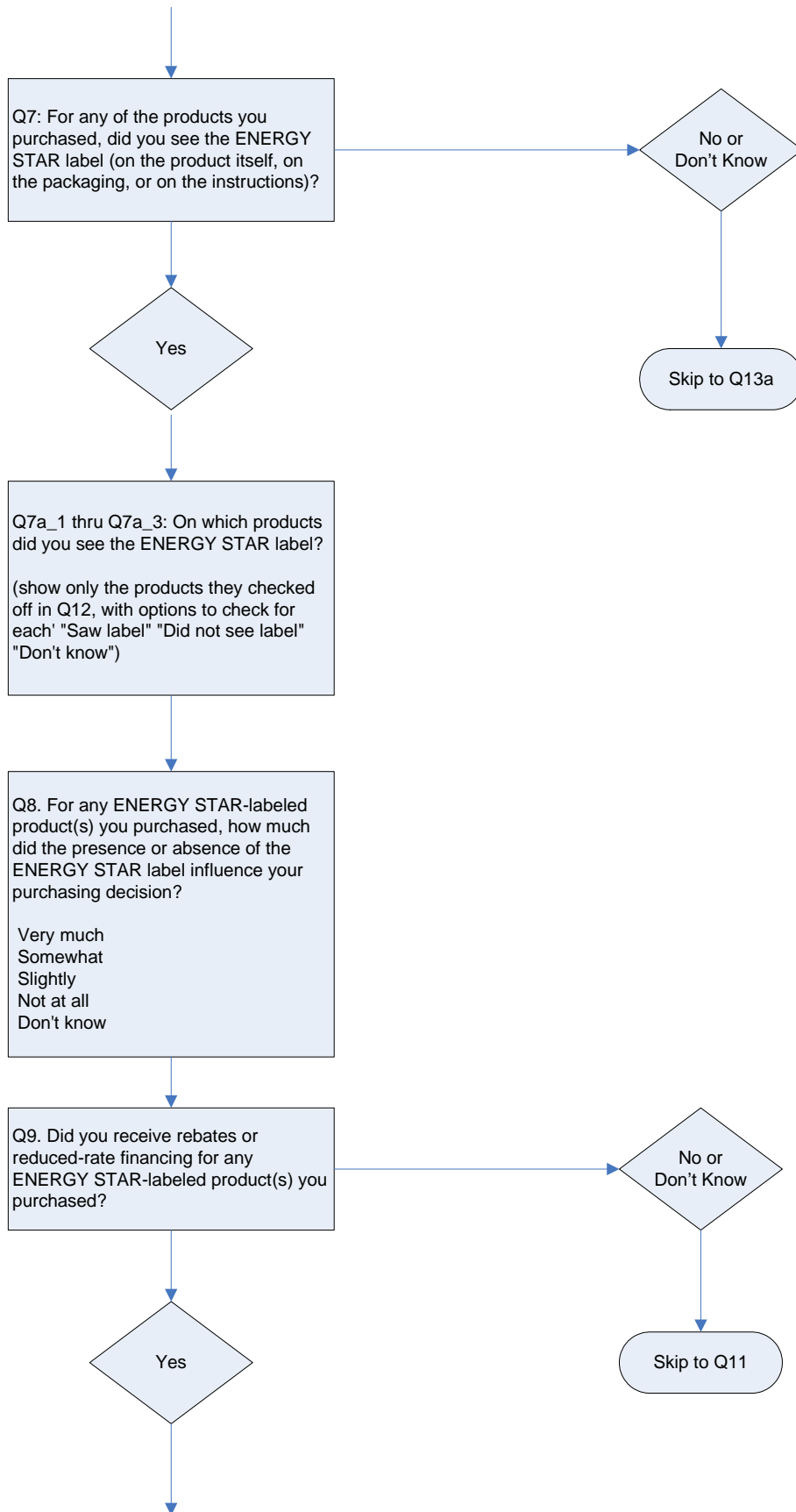
Yes
No
Don't know

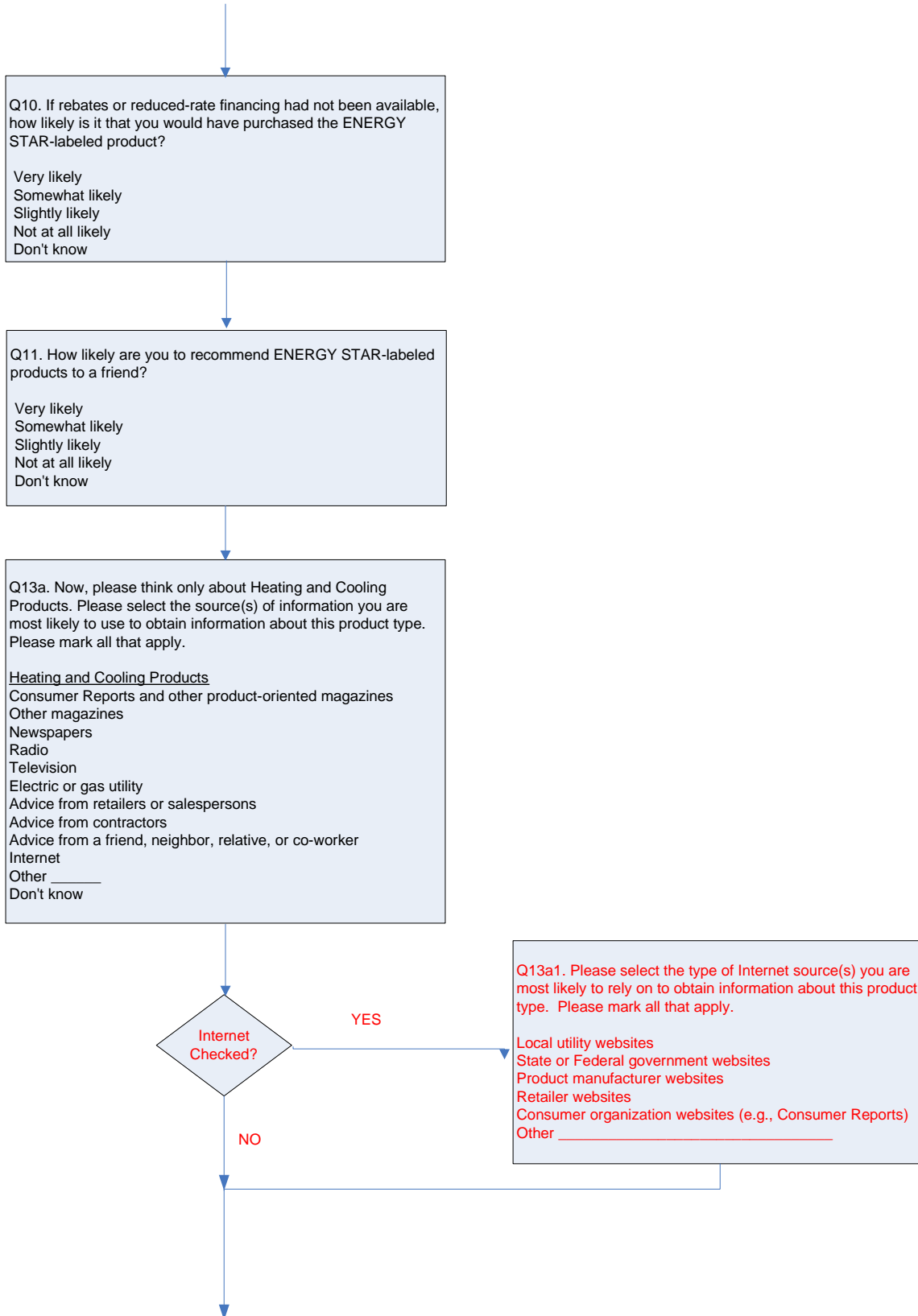
<u>Heating and Cooling Products</u>
Central air conditioner
Furnace or boiler
Heat pump
Thermostat
Room air conditioner
<u>Home Office Equipment</u>
Computer or monitor
Computer printer
Copying machine
Fax machine
Scanner
<u>Home Appliances/Lighting</u>
Dishwasher
Refrigerator
Lighting fixture
Washing machine
Compact fluorescent light bulb
Microwave oven
<u>Home Electronics</u>
Television
VCR
Audio product
<u>Building Materials</u>
Window
Door
Skylight
Insulation
Roofing material

Q6b
Have you or someone else in your household been shopping for a newly built home in the last 12 months?

Yes
No
Don't know

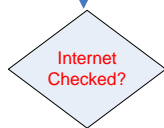






Q13b. Now, please think only about Home Appliances / Lighting / Home Electronics. Please select the source(s) of information you are most likely to use to obtain information about this product type. Please mark all that apply.

Home Appliances / Lighting / Home Electronics
 Consumer Reports and other product-oriented magazines
 Other magazines
 Newspapers
 Radio
 Television
 Electric or gas utility
 Advice from retailers or salespersons
 Advice from contractors
 Advice from a friend, neighbor, relative, or co-worker
 Internet
 Other _____
 Don't know



Q13a1. Please select the type of Internet source(s) you are most likely to rely on to obtain information about this product type. Please mark all that apply.

Local utility websites
 State or Federal government websites
 Product manufacturer websites
 Retailer websites
 Consumer organization websites (e.g., Consumer Reports)
 Other _____

On the scale by each statement, please indicate how strongly you agree or disagree with the statement.

(Note to programmer: present q41a through f in random order for each respondent.)

	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
Q15a. Products with the ENERGY STAR label have fewer features than products without the label.	1	2	3	4	5
Q15b. Products with the ENERGY STAR label are higher quality products than those without the label.	1	2	3	4	5
Q15c. Products with the ENERGY STAR label don't save any more energy than other new products.	1	2	3	4	5
Q15d. Products with the ENERGY STAR label cost less to use than products without the label.	1	2	3	4	5
Q15e. The U.S. government gives the ENERGY STAR label to products that meet energy efficiency guidelines.	1	2	3	4	5
Q15f. Products with the ENERGY STAR label are better for the environment than products without the label.	1	2	3	4	5

Go to demographic questions and closing

Appendix B: Mail Survey

ENERGY STAR® Survey

Directions

Who should fill out the survey?

Someone in your household who makes decisions about major appliance and home electronics purchases and is over 18 should fill out the survey.

How should I complete the survey?

For each of the questions below, please write your brief response neatly or mark the answers that best describe your household with an **X** in the boxes provided. Based on your response, you may be asked to go to the next question or to skip to another question. Please return your questionnaire in the postage-paid envelope provided.

What if I have questions?

If you have any questions about the survey, please call SRBI toll-free at 1-888-772-4269 between the hours of 9:00 AM and 11:00 PM Eastern Time.



1 Please look at the ENERGY STAR label above. Write the messages that come to mind when you see the ENERGY STAR label.

2 Before this survey, had you ever seen or heard of this label?

- Yes
- No → (Skip to Question 12 on page 3)

3 Where did you hear or see something about ENERGY STAR? Please mark all that apply.

- Newspaper or magazine advertisement
- Newspaper or magazine article
- TV commercial
- TV news feature story
- Radio commercial
- Billboard
- Utility mailing or bill insert
- Direct mail or circular advertisement
- Labels on appliances or electronic equipment
- Yellow *EnergyGuide* label
- Displays in stores
- Internet
- Salesperson
- Contractor
- Friend, neighbor, relative, or co-worker
- Other (*please specify*) _____
- Don't know

4 What did you see or hear about ENERGY STAR? Please be specific.

continued on next page

- 5** Please review the following list and mark with an **X** each of the products, product literature, or packaging on which you have seen the ENERGY STAR label.

Heating and Cooling Products

- Central air conditioner
- Furnace or boiler
- Heat pump
- Thermostat
- Room air conditioner

Home Office Equipment

- Computer or monitor
- Computer printer
- Copying machine
- Fax machine
- Scanner

Home Appliances/Lighting

- Dishwasher
- Refrigerator
- Lighting fixture
- Washing machine
- Compact fluorescent light bulb
- Microwave oven

Home Electronics

- Television
- VCR
- Audio product

Building Materials

- Window
- Door
- Skylight
- Insulation
- Roofing material

Buildings

- Newly built home
- None of these products

- 6** Have you purchased any of the products listed in the previous question in the last 12 months?

- Yes
- No → (Skip to Question 13 on page 3)

- 7** For any of the products you purchased, did you see the ENERGY STAR label (on the product itself, on the packaging, or on the instructions)?

- Yes
 - ↳ On which products did you see the ENERGY STAR label? (please list all products)

- No → (Skip to Question 12 on page 3)
- Don't know → (Skip to Question 12 on page 3)

- 8** For any ENERGY STAR-labeled product(s) you purchased, how much did the presence or absence of the ENERGY STAR label influence your purchasing decision?

- Very much
- Somewhat
- Slightly
- Not at all
- Don't know

- 9** If you purchased an ENERGY STAR-labeled product, did you receive rebates or reduced-rate financing?

- Yes
- No → (Skip to Question 11)
- Don't know → (Skip to Question 11)

- 10** If rebates or reduced-rate financing had not been available, how likely is it that you would have purchased the ENERGY STAR-labeled product?

- Very likely
- Somewhat likely
- Slightly likely
- Not at all likely
- Don't know

- 11** How likely are you to recommend ENERGY STAR-labeled products to a friend?

- Very likely
- Somewhat likely
- Slightly likely
- Not at all likely
- Don't know

continued on next page

- 12** Which of the following products have you purchased in the last 12 months? Please mark with an **X** all that apply.

Heating and Cooling Products

- Central air conditioner
- Furnace or boiler
- Heat pump
- Thermostat
- Room air conditioner

Home Office Equipment

- Computer or monitor
- Computer printer
- Copying machine
- Fax machine
- Scanner

Home Appliances/Lighting

- Dishwasher
- Refrigerator
- Lighting fixture
- Washing machine
- Compact fluorescent light bulb
- Microwave oven

Home Electronics

- Television
- VCR
- Audio product

Building Materials

- Window
- Door
- Skylight
- Insulation
- Roofing material

Buildings

- Newly built home
- None of these products

- 13** Please look at the product types listed below. Please mark with an **X** the source(s) of information you are most likely to use to obtain information about that product type. Please mark all that apply.

Heating and Cooling Products

- Consumer Reports* and other product-oriented magazines
- Other magazines
- Newspapers
- Radio
- Television
- Electric or gas utility
- Advice from retailers or salespersons
- Advice from contractors
- Advice from a friend, neighbor, relative, or co-worker
- Internet
- Other
- Don't know

Home Appliances/Lighting/Home Electronics

- Consumer Reports* and other product-oriented magazines
- Other magazines
- Newspapers
- Radio
- Television
- Electric or gas utility
- Advice from retailers or salespersons
- Advice from contractors
- Advice from a friend, neighbor, relative, or co-worker
- Internet
- Other
- Don't know

continued on next page

Please Note

We emphasize that this survey is *strictly confidential*. Your responses will be grouped with the responses of other survey participants, and your name will not be associated with your responses or be provided to anyone else.

- 14** How many people live in your household, including yourself? *(Please count children as well as adults. Include all members of your household who live with you 6 months or more during the year, whether or not they are related to you.)*

Number of people in household: _____

- 15** What is your age?

- 18 - 24
- 25 - 34
- 35 - 44
- 45 - 54
- 55 - 64
- 65 - 74
- 75 or older

- 16** What is your gender?

- Male
- Female

- 17** Which of the following best describes your home?

- Single-family home not attached to others
- Townhouse or row house
- Duplex or triplex
- Apartment (in building with 4 or more units)
- Mobile home
- Other

- 18** How many bedrooms do you have in your home?

Number of bedrooms: _____

- 19** Do you or another household member own or rent your present home?

- Own
- Rent
- Occupy but do not pay rent

- 20** Please mark the box indicating the total combined income in the last 12 months of all family members living in your household. *(Include income from all sources before taxes and deductions.)*

- Less than \$15,000
- \$15,000 - \$19,999
- \$20,000 - \$24,999
- \$25,000 - \$39,999
- \$40,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 and over

Thank you very much for your assistance.

Please return your questionnaire in the postage-paid envelope provided.