



ENERGY STAR

NATIONAL AWARENESS OF ENERGY STAR® FOR 2011

ANALYSIS OF CEE HOUSEHOLD SURVEY



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EXECUTIVE SUMMARY

In the fall of 2011, members of the Consortium for Energy Efficiency (CEE) sponsored the twelfth national household survey of consumer awareness of ENERGY STAR. Each year, the survey objectives have largely been the same: to collect national data on consumer recognition, understanding, and purchasing influence of the ENERGY STAR label, as well as data on messaging and product purchases. CEE members may choose to supplement the national sample by adding additional data points in order to assess label awareness in their local service territories.

This report discusses the results of the CEE 2011 ENERGY STAR Household Survey, building on prior years' survey results and focusing on the extent to which consumers recognize the ENERGY STAR label, understand its intended messages, and utilize (or are influenced by) the label in their energy-related purchase decisions. Research questions of interest included:

- Where do consumers see or hear about the ENERGY STAR label?
- How does increased publicity affect recognition, understanding, and influence of the ENERGY STAR label?
- Which key messages about the ENERGY STAR label are consumers retaining?
- Do consumers demonstrate loyalty to the ENERGY STAR label?

Key Findings at the National Level

- Eighty-four percent of households recognized the ENERGY STAR label when shown the label. This is similar to the 83 percent finding in 2010.
- Eighty-five percent of households had a *high* or *general* understanding of the label's purpose. Furthermore, the proportion of households that demonstrated a general understanding was small compared with the proportion that demonstrated a high understanding (10 percent versus 75 percent).
- The proportion of households with a high understanding of the ENERGY STAR label has increased from 70 percent in 2009 to 73 percent in 2010 and up to 75 percent in 2011. The difference between 2009 and 2011 is statistically significant at the 10 percent level (p -value = 0.089).
- Sixty-four percent of households associated the ENERGY STAR label with "efficiency or energy savings."
- Of households that recognized the ENERGY STAR label (aided) and purchased a product in a relevant product category within the past 12 months, 78 percent purchased an ENERGY STAR-labeled product.

- Among all households, 44 percent knowingly purchased an ENERGY STAR-labeled product in the past 12 months.
- For 76 percent of the households that recognized the ENERGY STAR label (aided), and knowingly purchased an ENERGY STAR-labeled product, the label influenced at least one of their purchase decisions “very much” or “somewhat.” For another 12 percent of these households, the label influenced their purchase decisions “slightly.”
- Twenty-four percent of households that knowingly purchased an ENERGY STAR-labeled product received a financial incentive for doing so in 2011, the same as in 2010. Eighty-eight percent of these households report they would have been “very likely” (60 percent) or “somewhat likely” (28 percent) to purchase the labeled product without the financial incentive.
- Seventy-eight percent of households that recognized the label and purchased a product in a category where ENERGY STAR-labeled products are an option were likely to recommend ENERGY STAR-labeled products to a friend; 32 percent of these households reported that they were “extremely likely” to recommend ENERGY STAR-labeled products.

Key Findings from Publicity-Level Analyses

High-publicity areas are defined as having a locally sponsored energy efficiency program [sponsored by a utility, state agency, or other organization] that has actively and continuously promoted ENERGY STAR for two or more years.

- Without a visual aid, 79 percent of households in high-publicity areas recognized the label versus 70 percent in non-high-publicity areas; this difference is statistically significant (p -value = 0.012). When the label was shown to them, about the same proportion of households in high- and non-high-publicity areas recognized it, 86 percent in high publicity and 82 percent in non-high publicity areas (p -value > 0.10).
- More households exhibited a high degree of understanding of the ENERGY STAR label in high-publicity areas (77 percent) than in non-high-publicity areas (72 percent). This difference is significant at the 10 percent level (p -value = 0.091).
- Sixty-eight percent of the households in high-publicity areas associated the ENERGY STAR label with “efficiency or energy savings,” compared with 60 percent of households in non-high-publicity areas. This difference is statistically significant at the 5 percent level (p -value = 0.049).
- Considering only households that recognized the label (with a visual aid), a larger proportion of households in high- than in non-high-publicity areas heard or saw something about ENERGY STAR via radio commercials or from a friend, neighbor, relative or co-worker.

Conclusions

This twelfth national study of household awareness of the ENERGY STAR label confirms key findings from the previous years' surveys:

- Substantial portions of U.S. households in the surveyed population recognize, understand, and are influenced by the ENERGY STAR label.
- Understanding of the label's messaging continues to increase. The proportion of households with a high understanding of the label has increased over the past several years, from 70 percent in 2009 to 75 percent in 2011.
- The proportion of households that exhibit only a general understanding of the label is small (10 percent) compared with the proportion of households that exhibit a high understanding (75 percent).
- Aided recognition of the ENERGY STAR label in non-high-publicity areas is quite similar to aided recognition in high-publicity areas. It should be noted that during 2011, some states continued to offer rebates for ENERGY STAR qualified appliances via funding (administered by the U.S. Department of Energy) from the American Recovery and Reinvestment Act of 2009.
- Publicity efforts of active regional/local energy efficiency program sponsors are associated with increased recognition (unaided) and understanding of the ENERGY STAR label:
 - Unaided recognition of the label is higher (79 percent) in high-publicity areas than in non-high-publicity areas (70 percent).
 - A larger proportion of households exhibit a high degree of understanding of the label in high-publicity areas (77 percent) than in non-high-publicity areas (72 percent).
 - A larger proportion of households in high- (68 percent) than non-high-publicity areas (60 percent) associate the label with "energy efficiency/savings."

INTRODUCTION

In the fall of 2011, members of the Consortium for Energy Efficiency (CEE) sponsored the twelfth national household survey of consumer awareness of ENERGY STAR. Each year, the survey objectives have largely been the same: to collect national data on consumer recognition, understanding, and purchasing influence of the ENERGY STAR label, as well as data on messaging and product purchases.

This report discusses the results of the CEE 2011 ENERGY STAR Household Survey, building on prior years' survey results and focusing on the extent to which consumers recognize the ENERGY STAR label, understand its intended messages, and utilize (or are influenced by) the label in their energy-related purchase decisions. Research questions of interest included the following:

- Where do consumers see or hear about the ENERGY STAR label?
- How does increased publicity affect recognition, understanding, and influence of the ENERGY STAR label?
- Which key messages about the ENERGY STAR label are consumers retaining?
- Do consumers demonstrate loyalty to the ENERGY STAR label?

The remainder of this report summarizes the survey and analysis methodology; it provides key findings regarding ENERGY STAR label recognition, understanding, influence, and information sources. It also contains appendices presenting detailed survey methodology (Appendix A), demographic information (Appendix B), additional questions from the 2011 survey (Appendix C), and a copy of the 2011 questionnaire (Appendix D). In all cases, the results presented in this report were weighted to obtain results applicable at the national level (please refer to Appendix A for details on the weighting methodology).

METHODOLOGY OVERVIEW

During September 2011, CEE fielded a questionnaire to obtain information at the national level on consumer awareness of the ENERGY STAR label (please refer to Appendix A for a more detailed outline of the survey methodology). A random sample of households that are members of an internet panel was surveyed. Both the internet panel as a whole and the sample of households completing the survey were selected by address-based sampling and recruited by telephone.¹ The panel is designed to be representative of the U.S. population.

This year's questionnaire was similar to the ones CEE fielded in 2000 – 2010. As in previous years, CEE and its sponsoring members made the survey data available to EPA for analysis.

The survey was a national survey. The sampling frame for this national survey included all households in the largest Nielsen Designated Market Areas[®] (DMA) that together accounted for about 70 percent of U.S. television households (the largest 57 DMAs). In prior years, some CEE members chose to sponsor more intensive sampling (i.e., an oversample) in selected localities, referred to here as *sponsor areas*. In 2011, no CEE member chose to sponsor an oversample.

As in previous years' studies, the Top-57 DMAs in the sampling frame were classified by publicity category. The original intent of the classification was to be able to assess the effect of local energy efficiency program publicity on awareness. The majority of these local efficiency programs historically have been supported by utility rate-payer funding. It should be noted that during 2011, some states continued to offer rebates for ENERGY STAR qualified appliances via funding (administered by the U.S. Department of Energy) from the American Recovery and Reinvestment Act of 2009.

A decision was made to retain the same publicity classification procedure used in the past 10 years and to retain the prior year's publicity classification of the 57 largest DMAs—in essence preserving the historical classification for future study years, which was based on the following criteria:

- **High publicity:** Active local ENERGY STAR promotion *recently* sponsored by a utility, state agency, or other organization for two or more continuous years. The activities must include *sustained* promotions and publicity from non-federal sources.
- **Low publicity:** Federal campaign activities only and no *significant* regional program sponsor activities.

¹ In previous years, the panel was recruited via random-digit dial. Knowledge Networks, the firm that conducts the survey each year, believes that address-based sampling (ABS) offers advantages, including coverage of cell-phone-only households, and analysis of non-response bias. More information is available at <http://www.knowledgenetworks.com/accuracy/fall-winter2010/abs-fall2010.html>.

- **Other:** All other DMAs.

The key working definitions are below:

- **Recent:** The 2 years of activity must include the time period during which the survey was in the field.
- **Sustained:** The 2 years of activity must be continuous.
- **Significant:** In addition to any direct federal publicity efforts, a DMA's publicity efforts must include a deliberate and multifaceted regional program sponsor investment in ENERGY STAR programming, such as direct marketing efforts or the creation and distribution of promotional material.

Although the sample design was based on the 2011 publicity classifications, given the significant short-term publicity and funding associated with ARRA, for the purpose of this report, *low publicity* and *other publicity* are combined in the analysis and referenced as *non-high-publicity* areas. Another reason to combine these categories in the analysis is that over time, the population of low-publicity DMAs has dropped to about 15 percent, while high-publicity DMAs now account for about half of U.S. television households.

The sample was stratified by area and within an area by publicity category. While the dataset has always been appropriately weighted in the national analysis, beginning in 2010, the number of respondents in each stratum was chosen in proportion to that stratum's share of the U.S. population living in DMAs. As in the past for the national sample, the three publicity categories (the top 57 DMAs) comprise 1,000 respondents.

This report presents the 2011 survey results at the national level and by publicity category. Results are presented on consumer recognition and understanding, and purchasing influence of the ENERGY STAR label, as well as on messaging, product purchases, and information sources that consumers use in their purchasing decisions.

In this report, the following terminology is used in comparing results across years or sub-categories. (1) The term "significant" implies statistical significance. In other words, differences between proportions that are described as "significant" are at least statistically different at the 10-percent level of significance. In some cases, the p-values are given to provide the exact level of statistical significance. (2) Unless stated otherwise, terms such as "smaller," "larger," "increase," or "decrease" refer to changes that are statistically significant at the 10-percent level or better. (3) The term "similar" implies that there is no statistical difference between the results being compared at the 10-percent level of significance. In other words, the difference between the results is within the bounds that would be expected from chance variation in a random sample.

KEY FINDINGS

RECOGNITION

In 2011, 84 percent of households recognized the ENERGY STAR label when shown the label (i.e., *aided recognition*). Seventy-five percent of households recalled having seen or heard of the ENERGY STAR label without first being shown the label (i.e., *unaided recognition*).

For purposes of this analysis, respondents were said to recognize the ENERGY STAR label if they had seen or heard of the label before the survey. Recognition of the label was explored in two ways. Unaided recognition was measured by asking if the respondent had seen or heard of the ENERGY STAR label without showing the label. Delivery of the survey by internet made it possible to measure unaided recognition. Aided recognition was measured by showing respondents the ENERGY STAR label and then asking if they had seen or heard of the label. Both methods are useful measurements of label recognition, although unaided recognition is the more conservative of the two.

Recognition results for both the 2011 and 2010 surveys are summarized in the following table. Aided and unaided recognition of the ENERGY STAR label results are similar in 2010 and 2011.

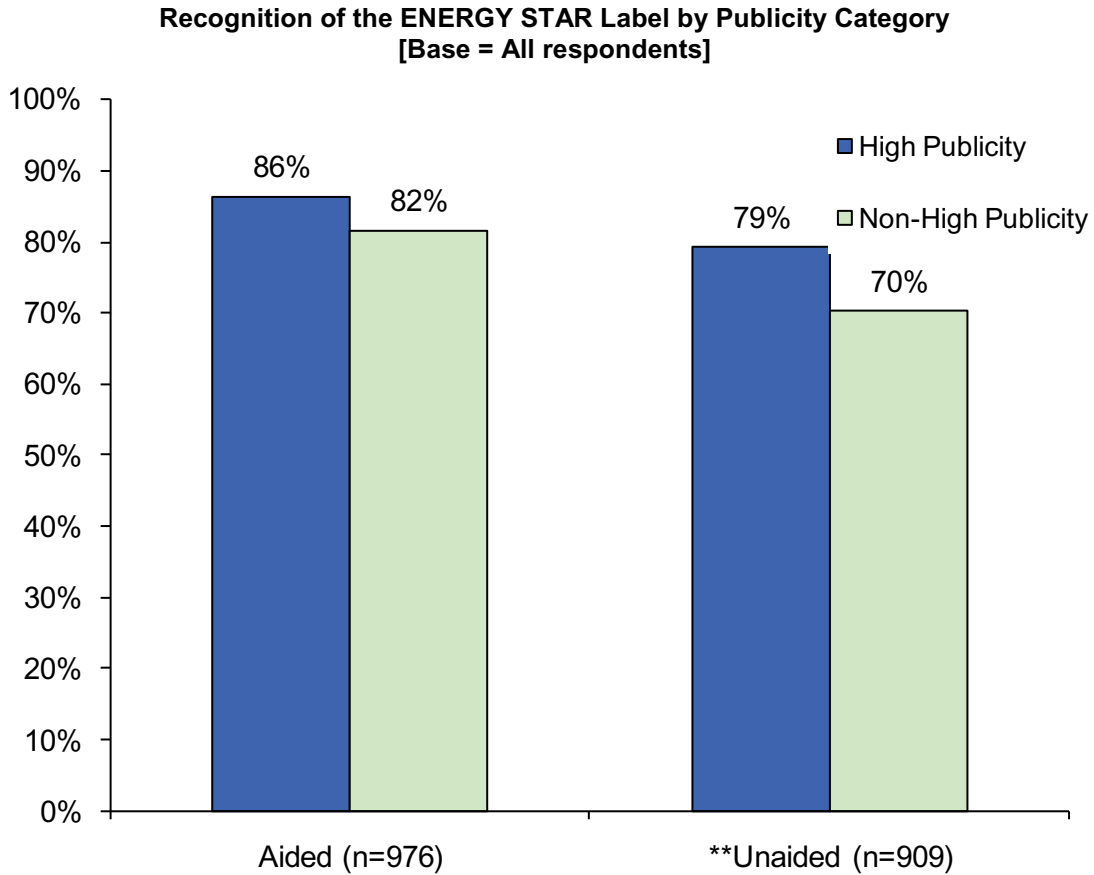
Recognition of the ENERGY STAR Label
[Base = All respondents]

Recognize ENERGY STAR Label	2011		2010	
	Aided (n=976)	Unaided (n=909)	Aided (n=1,641)	Unaided (n=1,521)
Yes	84%	75%	83%	72%
Standard error	1.5%	1.8%	1.3%	1.7%

Note: The unaided recognition results for both years were based on the question ES1: "Have you ever seen or heard of the ENERGY STAR label?" The aided recognition results were based on five questions. (1) ES3A and (2) ES3B were asked if ES1 = "yes." ES3A: "Is this the label you have seen or heard of before?"—whether the old or new label was shown was randomly determined. ES3B: "Have you seen or heard of this version of the ENERGY STAR label?" — where the label shown was the one not shown previously. (3) ES3C and (4) ES3D were asked if ES1 = "no." ES3C: "Please look at the ENERGY STAR label on the left. Have you ever seen or heard of this label?"—whether the old or new label was shown was randomly determined. ES3D: "Have you seen or heard of this version of the ENERGY STAR label?"—where the label shown was the one not shown previously. (5) ES6 was asked if either ES1 = "no" or both ES3A and ES3B = "no." ES6: "Now that you have had the opportunity to see the ENERGY STAR label, do you recall seeing or hearing anything about it before this survey?"—where both the old and new labels were shown.

Recognition by Publicity Category

After being shown the ENERGY STAR label (aided), 86 percent of households in high-publicity areas, and 82 percent in non-high-publicity areas recognized the label; this difference was not statistically significant (p-value = 0.102). However, unaided recognition was higher in high-publicity areas. Unaided recognition was 79 percent in high-publicity areas and 70 percent in non-high-publicity areas; this difference was statistically significant at the 5-percent level for unaided recognition (p-value = 0.012).



** High- and non-high-publicity area proportions are statistically different from each other at the 5-percent level of significance (p-value \leq 0.05).

Product Associations

Households that recognized the ENERGY STAR label (aided) indicate strong association between the label and products historically supported by regional energy efficiency programs (refrigerators, washing machines, dishwashers, compact fluorescent light bulbs, etc.).

Survey respondents that recognized the ENERGY STAR label (aided) were asked, “What types of products, goods, and services do you think of when you think of the ENERGY STAR label?” (survey question QA). The figure on the next page presents the results for this question, which indicate *unprompted* product associations.

Unprompted, appliances, refrigerators, and washing machines showed the strongest associations with the label at 43, 37, and 33 percent, respectively. Though it does not have an ENERGY STAR specification, clothes dryers showed the fourth strongest association with the label at 29 percent. The next most strongly associated products (unprompted) were dishwashers, stoves/ovens, and air conditioners, at 16, 14, and 13 percent, respectively. Of the top eight product associations, none are significantly different from the 2010 results. The list of products mentioned by households without prompting also includes two products, in addition to clothes dryers, that do not have an ENERGY STAR specification: microwave ovens and stoves/ovens. Windows and insulation showed a significant increase from 2010 in unprompted association; however, these products were mentioned by relatively few respondents (6% and 1% respectively).

When prompted, 88 percent of households had seen the label on refrigerators. Washing machines (79 percent) and dishwashers (76 percent) were the next products most commonly associated with the ENERGY STAR label. Windows, central A/C, gas water heaters, televisions, room air conditioners, and microwave ovens, followed next in a range of 43 to 55 percent. While 43 percent of households associated microwave ovens with the ENERGY STAR label, as mentioned above, they are not a product category eligible for ENERGY STAR labeling.

No products show a significant increase or decrease in prompted association compared to 2010.

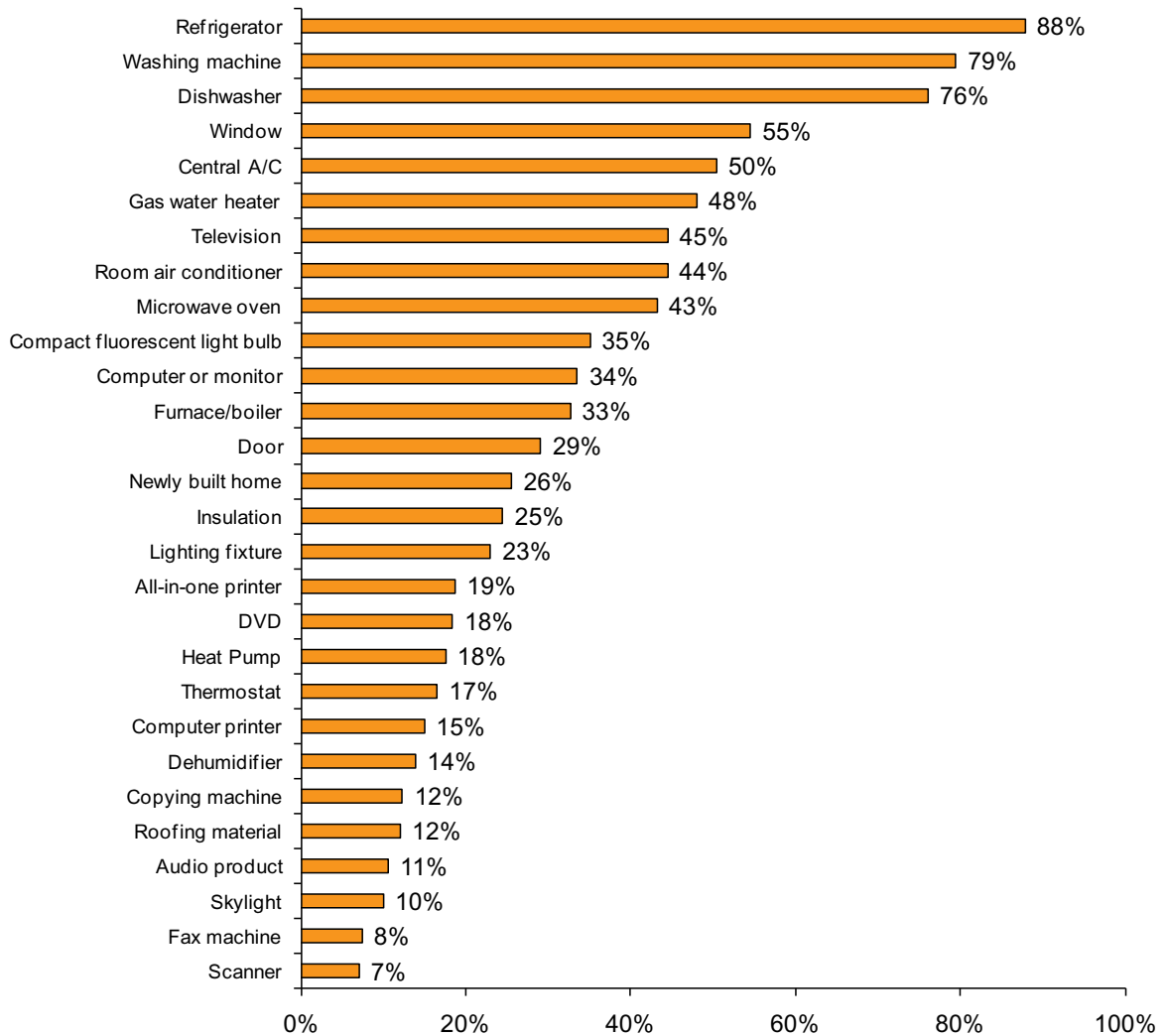
Unprompted Product Association with the ENERGY STAR Label
[Base = Recognize label (aided), n = 732]

Note: QA: "What types of products, goods, or services do you think of when you think of the ENERGY STAR label?
Please write your answers below."

*** 2011 and 2010 proportions are statistically different from each other at the 1-percent level of significance
(p- The proportion of households in 2011 is larger than 2010 for window.

** 2011 and 2010 proportions are statistically different from each other at the 5-percent level of significance
(p-

**Prompted Product Association with the ENERGY STAR Label
[Base = Recognize label (aided)²]**



Note: Q5 (a, b, and c): “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.” 2011 and 2010 proportions are statistically similar for all products.

² Respondents were asked about three sets of product groupings: (1)(a) Heating and Cooling Products and Home Office Equipment, (2)(b) Home Appliances/Lighting and Home Electronics, and (3)(c) Building Materials and Buildings. The sample sizes, n, for these sets of product groupings are 744, 744, and 717 respectively.

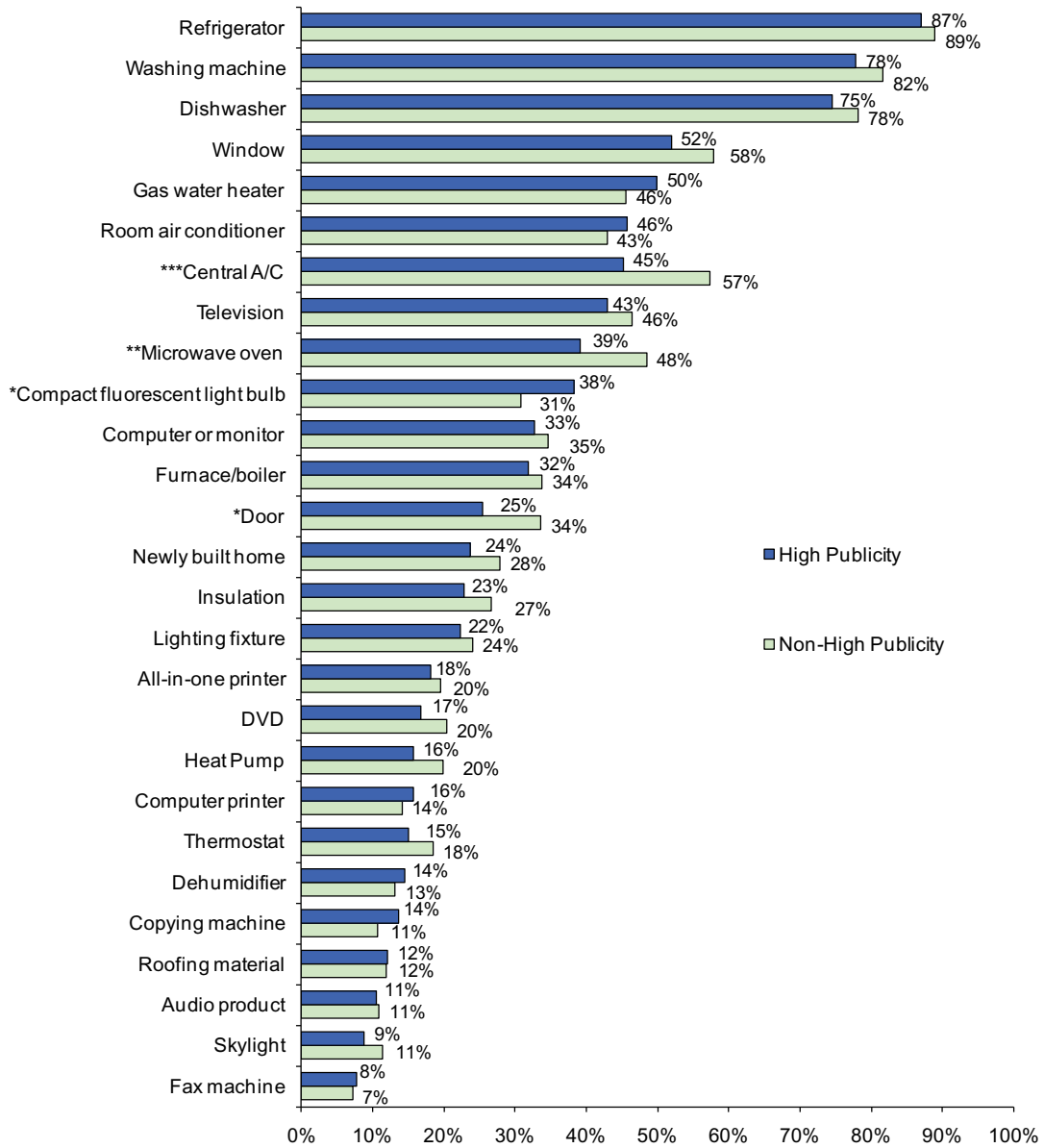
Product Associations by Publicity Category

Regional energy efficiency program sponsors have traditionally focused on promoting ENERGY STAR qualified lighting, refrigerators, room air conditioners, washing machines, dishwashers, programmable thermostats³, and new homes. More recently, program sponsors have begun to promote ENERGY STAR qualified water heaters and TVs in some parts of the country. In addition, some programs that have traditionally promoted ENERGY STAR appliances might have begun promoting higher levels of efficiency due to local market conditions, or discontinued some promotions due to state-run ENERGY STAR appliance rebate programs coming online in response to the American Recovery and Reinvestment Act. Key findings from this year's analysis of product association by publicity category include the following.

- A significantly larger proportion of households in high-publicity areas (38 percent) than non-high-publicity areas (31 percent) associated compact fluorescent light bulbs (CFLs) with the ENERGY STAR label when prompted.
- A significantly smaller proportion of households in high- than in non-high-publicity areas associated central A/C, microwave ovens (which do not qualify for ENERGY STAR labeling), and doors with the label when prompted.

³ EPA suspended the use of the ENERGY STAR label for programmable thermostats December 31, 2009. While EPA recognizes the potential for programmable thermostats to save significant amounts of energy, there continue to be questions regarding the net savings and environmental benefits achieved due to variations in consumer understanding and usage of programmable thermostats. EPA is working to develop a related Residential Climate Control specification. For more information visit: www.energystar.gov/productdevelopment.

Prompted Product Association with the ENERGY STAR Label by Publicity Category
[Base = Recognize label (aided)]⁴⁵



*** High- and non-high-publicity area proportions are statistically different from each other at the 1-percent level of significance (p-value≤0.01).

** High- and non-high-publicity area proportions are statistically different from each other at the 5-percent level of significance (p-value≤0.05).

* High- and non-high-publicity area proportions are statistically different from each other at the 10-percent level of significance (p-value≤0.10).

⁴ As discussed in footnote 3, respondents were asked about three sets of product groupings. In Heating and Cooling Products and Home Office Equipment, the sample sizes for high- and non-high- publicity areas are 401 and 343, respectively. For Home Appliances/Lighting and Home Electronics they are 401 and 343, and for Building Materials and Buildings they are 383 and 334.

⁵ The percent labels on the bars are rounded to nearest whole number. Therefore bars with the same label may not appear to be the same length.

UNDERSTANDING

In 2011, 85 percent of households had at least a general understanding of the ENERGY STAR label. Furthermore, the proportion of households that exhibited only a general understanding (10 percent) was small compared with the proportion that exhibited a high understanding (75 percent). The level of understanding was investigated by asking respondents what messages came to mind when they saw the ENERGY STAR label. Based on the reported messages, a respondent's understanding was classified as *high*, *general*, or *no understanding*.

The 2011, 2010, and 2009 survey results on the level of understanding of the ENERGY STAR label are provided in the following table. The proportion of respondents with a high understanding of the label has increased from 70 percent in 2009 to 75 percent in 2011. This difference statistically significant at the 10 percent level ($p\text{-value}=0.089$). There are no statistical differences in the level of understanding between 2011 and 2010.

Understanding of the ENERGY STAR Label
[Base = All respondents]

Level of Understanding of the Label	2011 (n=1,017)	2010 (n=1,707)	2009 (n=1,091)
High understanding	75%	73%	70%
General understanding	10%	12%	10%
No understanding	16%	16%	19%
Total	100%	100%	100%

Note: The level of understanding of the ENERGY STAR label is determined using the open-ended responses to two questions (1) ES2: "What does the ENERGY STAR label mean to you?", and (2) ES4A1: "Please look at the ENERGY STAR labels on the left. Type the messages that come to mind when you see the ENERGY STAR label."

In all years except 2006, all respondents were asked either ES2 or ES4A1, depending on their answers to ES1. Respondents that answered "Yes" to ES1 were then asked ES2, while all other respondents were asked ES4A1.

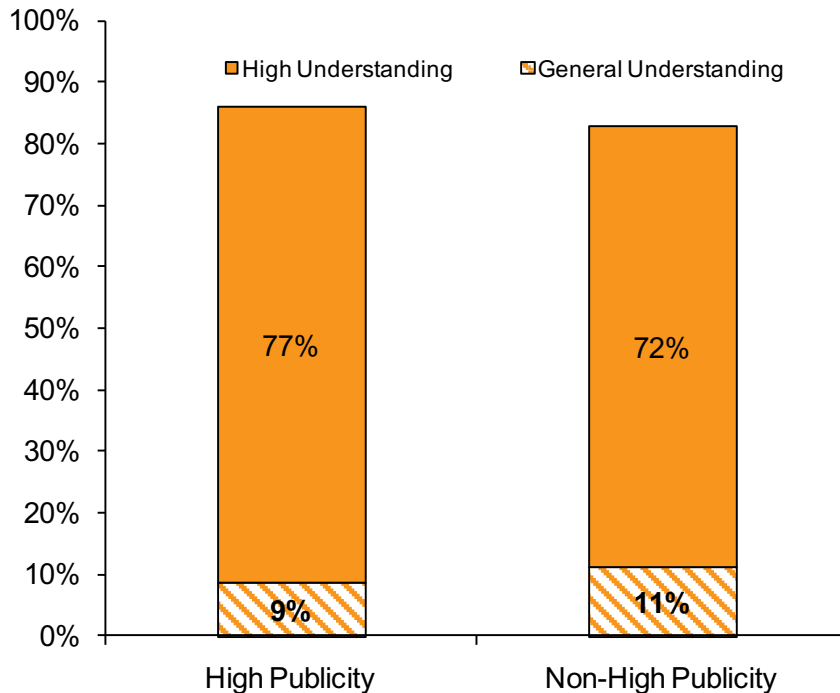
Understanding by Publicity Category

Eighty-six percent of households in high-publicity areas had at least a general understanding of the label compared with 83 percent of households in non-high-publicity areas. This difference between the publicity areas is not statistically significant at the 10-percent level. However, more households exhibited a high degree of understanding in high-publicity areas (77 percent) than in non-high-publicity areas (72 percent). This difference is significant at the 10 percent level (p-value = 0.091).

Understanding of the ENERGY STAR Label by Publicity Category
[Base = All respondents]

Publicity Category	At Least General Understanding of Label
High	86%
Non-high	83%
Difference (High minus Non-high)	3%
p-value	0.274

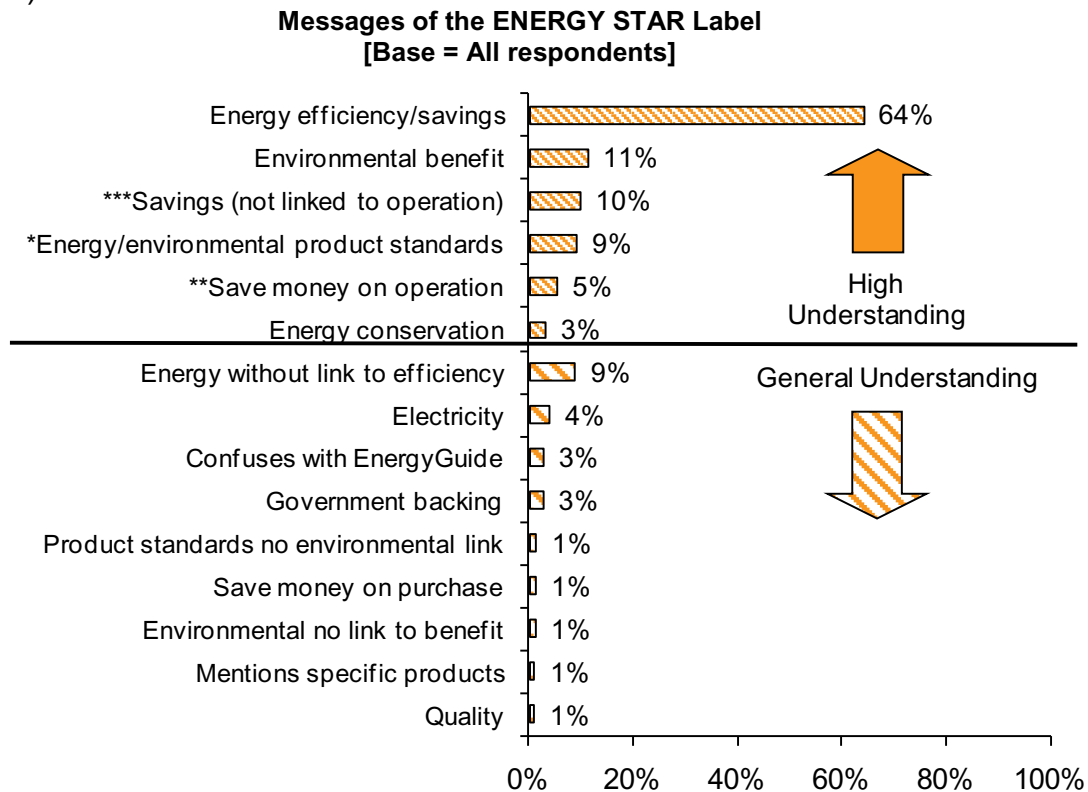
Understanding of the ENERGY STAR Label by Publicity Category
[Base = All respondents]



Understanding of Label Messaging

Open-ended responses to the questions on the level of understanding of the ENERGY STAR label are an indicator of how effectively EPA communicates its messages through the label. These responses are used in the analysis of understanding in the previous section. By far, the most common message associated with the label was “energy efficiency or energy savings,” which is considered high understanding of the label. Sixty-four percent of households surveyed associated the ENERGY STAR label with this message. The second most common response was “environmental benefit” offered by 11percent of households, which is also considered high understanding of the label.

Between 2010 and 2011 there was an increase in the proportion of respondents who associated the ENERGY STAR label with “savings (not linked to operation)” (4 percent to 10 percent) and “energy/environmental product standards” (7 percent to 9 percent) and there was a decrease in “save money on operation” (8 percent to 5 percent).



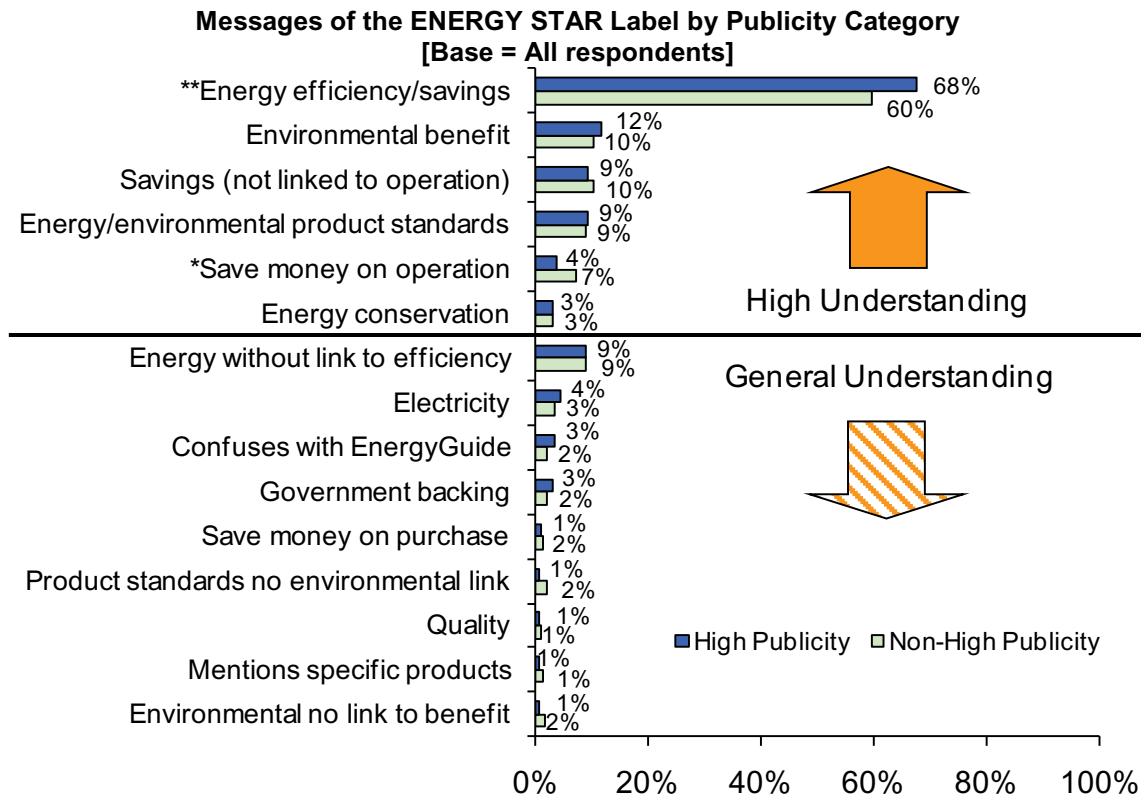
*** 2011 and 2010 proportions are statistically different from each other at the 1-percent level of significance (p-

** 2011 and 2010 proportions are statistically different from each other at the 5-percent level of significance (p-

* 2011 and 2010 proportions are statistically different from each other at the 10-percent level of significance (p-

Understanding of Label Messaging by Publicity Category

More respondents (68 percent) in high-publicity regions than in non-high-publicity regions (60 percent) associated the ENERGY STAR label with “energy efficiency/savings”; this difference is significant at the 5-percent level. Fewer respondents (4 percent) in high-publicity than in non-high publicity regions (7 percent) associated the label with “save money on operation” with the label; this difference is significant at the 10-percent level. For other messages, the proportion of households that associated the message with the ENERGY STAR label was similar for high- and non-high-publicity areas.



** High- and non-high-publicity area proportions are statistically different from each other at the 5-percent level of significance (p = 0.05).

* High- and non-high-publicity area proportions are statistically different from each other at the 10-percent level of significance (p = 0.10).

Understanding of the ENERGY STAR Label by Aided Recognition

Households that recognized the ENERGY STAR label when shown the label were more likely to have at least a general understanding of the label than those that did not recognize the label. In 2011, 90 percent of households that recognized the ENERGY STAR label had at least a general understanding of it, while among households that did not recognize the label, 58 percent had at least a general understanding of it. This 32 percentage point difference in understanding between households that recognized the label and those that did not is statistically significant at the 1-percent level.

Among households that did not recognize the label when shown it, the proportion that had at least a general understanding of the label in 2011 (58 percent) is statistically different (lower) from the 2010 result (74 percent). It is not statistically different from the 2009 result (63 percent), suggesting the 2010 result is not part of an upward trend.

Understanding of the ENERGY STAR Label by Aided Recognition
[Base = All respondents]

Recognize ENERGY STAR Label Aided	At Least General Understanding of Label		
	2011	2010	2009
Yes	90%	87%	63%
No	58%	74%	37%
Difference (Yes minus No)	32%	13%	26%
p-value	<0.0001	0.002	<0.0001

INFLUENCE

The survey provided some insight into consumers' decisions to purchase ENERGY STAR-labeled products, including the following:

- The proportion of households nationwide that recognized the ENERGY STAR label and knowingly purchased an ENERGY STAR-labeled product
- The influence of the ENERGY STAR label on purchase decisions
- The role of rebates or financing in decisions to buy ENERGY STAR-labeled products
- The loyalty of purchasers to ENERGY STAR-labeled products

Purchases of ENERGY STAR-labeled Products

In order to estimate the percent of *all* households that knowingly purchased an ENERGY STAR product, the following three proportions were multiplied:

- The proportion of all households that recognized the ENERGY STAR label (aided)
- Of the households that recognized the label (aided), the proportion that purchased a product in a product category that has an ENERGY STAR specification
- Of the households that recognized the label (aided) and purchased a product in a relevant category, the proportion that knowingly purchased an ENERGY STAR-labeled product

For each of the three proportions, the results for 2010 and 2011 are similar. In 2011, of the households that recognized the label (aided) and purchased a product in a relevant product category, 78 percent purchased an ENERGY STAR-labeled product.

**National Household Market Penetration of
ENERGY STAR Products by Year**

	Aided Recognition (2010 n=1,641) (2011 n=976)	Purchased Product (2010 n=1,400) (2011 n=829)	Knowingly Purchased ENERGY STAR product (2010 n=733) (2011 n=423)
2010	83%	67%	77%
2011	84%	67%	78%
Difference	-0.9%	0.5%	-0.5%
p-value	0.658	0.852	0.880

The overall result is that 44 percent of all households knowingly purchased an ENERGY STAR product in the past 12 months. This is similar to the 2010 result (43 percent).

**Knowingly Purchased ENERGY STAR Product By Year
(Base = All respondents)**

	2011 (n=976)	2010 (n=1,641)
Estimate (yes)	44%	43%
Standard Error	2.5%	2.2%

Purchases of ENERGY STAR by Publicity Category

The proportion of *all* households that knowingly purchased an ENERGY STAR product in high- versus non-high-publicity areas is 44 and 43 percent, respectively. This difference is not significant at the 10-percent level (p-value = 0.822). The market penetration of ENERGY STAR products in high-publicity areas and in non-high-publicity areas was similar between 2010 and 2011.

**Knowingly Purchased ENERGY STAR
Product by Publicity Category and Year
[Base = All respondents]**

Publicity Category	% Households	
	2011	2010
High	44%	43%
Non-High	43%	44%
Difference (High minus Non-High)	1%	-1%
p-value	0.822	0.757

As noted above, three proportions are used to calculate the proportion of *all* households that knowingly purchased an ENERGY STAR product: aided recognition

of the program label, purchase of a product in a relevant product category, and the proportion of those purchasers that knowingly bought ENERGY STAR products. In 2011, for each of these three proportions, the differences between high- and non-high-publicity areas are not statistically significant.

**National Household Market Penetration of
ENERGY STAR Products by Publicity Category**

	Aided Recognition (n = 976)	Purchased Product (n = 829)	Knowingly Purchased ENERGY STAR product (n = 423)
High Publicity	86%	66%	77%
Non-High Publicity	82%	67%	78%
Difference	4.8%	-1.1%	-1.1%
p-value	0.103	0.784	0.821

Influence of the ENERGY STAR Label

Half of the households that knowingly purchased an ENERGY STAR-labeled product in 2011 reported having been influenced “very much” by the label. For 12 percent of households, the label influenced their purchase decisions “slightly.” Another 12 percent of households reported the presence of the ENERGY STAR label had no influence on their purchase. These findings are not significantly different from those of 2010.

**Influence of the ENERGY STAR Label on Purchase Decisions⁶
[Base = Recognize label (aided) and ENERGY STAR purchasers]**

Influence of the Label on Purchasing Decisions	2011 (n=305) Maximum	2010 (n=556) Maximum
Very much	50%	48%
Somewhat	26%	26%
Slightly	12%	11%
Not at all	12%	15%
Total	100%	100%

Note: Q8: “For each ENERGY STAR-labeled product you purchased, how much did the ENERGY STAR label influence your purchase decision?”

⁶ Respondents that recognize the label (aided) and purchased an ENERGY STAR-labeled product are asked Q8 (“For each ENERGY STAR-labeled product you purchased, how much did the ENERGY STAR label influence your purchase decision?”) for each ENERGY STAR-labeled product they purchased. The results presented in this table use the highest influence rating provided by respondents that purchased more than one ENERGY STAR-labeled product.

Influence of the ENERGY STAR Label by Publicity Category

The purchase decisions of 53 percent of households in high-publicity areas were influenced "very much" by the ENERGY STAR label, compared to 45 percent in non-high-publicity areas; this difference is not significant at the 10-percent level. When these proportions are added to the proportions of households for which the ENERGY STAR label was "somewhat" influential in their purchasing decisions, the high- to non-high-publicity area comparison is 78 to 72 percent, respectively, which is not statistically different at the 10-percent level of significance. The combined "very much, somewhat, or slightly" proportion is 91 percent in high-publicity areas, and 84 percent in non-high-publicity areas, which is not statistically different at the 10 percent level.

Influence of the ENERGY STAR Label on Purchase Decisions by Publicity Category
[Base = Recognize label (aided) and ENERGY STAR purchasers, n = 305]

Publicity Category	Very much	Very much or somewhat	Very much, somewhat, or slightly
High	53%	78%	91%
Non-High	45%	72%	84%
Difference (High minus Non-High)	8%	6%	7%
p-value	0.252	0.316	0.134

Rebate and Financing Influence

From 2010 to 2011, the percentage of households that knowingly purchased an ENERGY STAR-labeled product and received rebates or reduced-rate financing was level at 24 percent. Of these households in 2011, 60 percent would have been “very likely” to purchase the ENERGY STAR product if financial incentives had not been available. This increase of 10 percentage points from the previous year is not statistically significant.

Another 28 percent would have been “somewhat likely” to purchase without a rebate in 2011. This leaves 10 percent that would have been “slightly likely” and 3 percent “not at all likely.” None of these are significantly different from 2010.

Received Financial Incentive for an ENERGY STAR Product Purchased [Base = Recognize label (aided) and ENERGY STAR purchaser]

Received Financial Incentive for an ENERGY STAR Product Purchased	% Households	
	2011 (n=281)	2010 (n=521)
Yes	24%	24%
No	76%	76%
Total	100%	100%

Note: Q9: “Did you receive rebates or reduced-rate financing for any ENERGY STAR-labeled product(s) you purchased?”

Influence of Rebates and Financing on Purchasing Decisions [Base = Recognize label (aided), ENERGY STAR purchaser, and received an incentive]

Likelihood Purchase ENERGY STAR Product Without Financial Incentive	% Households	
	2011 (n=65)	2010 (n=133)
Very likely	60%	50%
Somewhat likely	28%	25%
Slightly likely	10%	19%
Not at all likely	3%	5%
Total	100%	100%

Note: Q10: “If rebates or reduced-rate financing had not been available, how likely is it that you would have purchased the ENERGY STAR-labeled product?”

Loyalty to ENERGY STAR

Loyalty to ENERGY STAR is investigated by asking respondents who knowingly purchased an ENERGY STAR-labeled product how likely they would be to recommend ENERGY STAR products to a friend. Respondents were asked to report this likelihood on a scale of 0 to 10, where 0 means “extremely unlikely” and 10 means “extremely likely.” As can be seen in the table below, 32 percent of households who knowingly purchased an ENERGY STAR-labeled product reported they would be “extremely likely” to recommend ENERGY STAR products to a friend. This proportion is similar to the 2010 value.

The likelihood of recommending ENERGY STAR products to a friend is greater than “6” for 78 percent of these households. This is consistent with the previous year’s result of 79 percent.

Loyalty to ENERGY STAR
[Base = Recognize label (aided) and purchasers]

Likelihood Recommend ENERGY STAR Products	% Households	
	2011 (n=320)	2010 (n=577)
10 - Extremely likely	32%	29%
9	22%	24%
8	13%	16%
7	11%	10%
6	6%	7%
5	11%	8%
4	2%	2%
3	0%	1%
2	0%	1%
1	2%	1%
0 - Extremely unlikely	0%	2%
Total	100%	100%

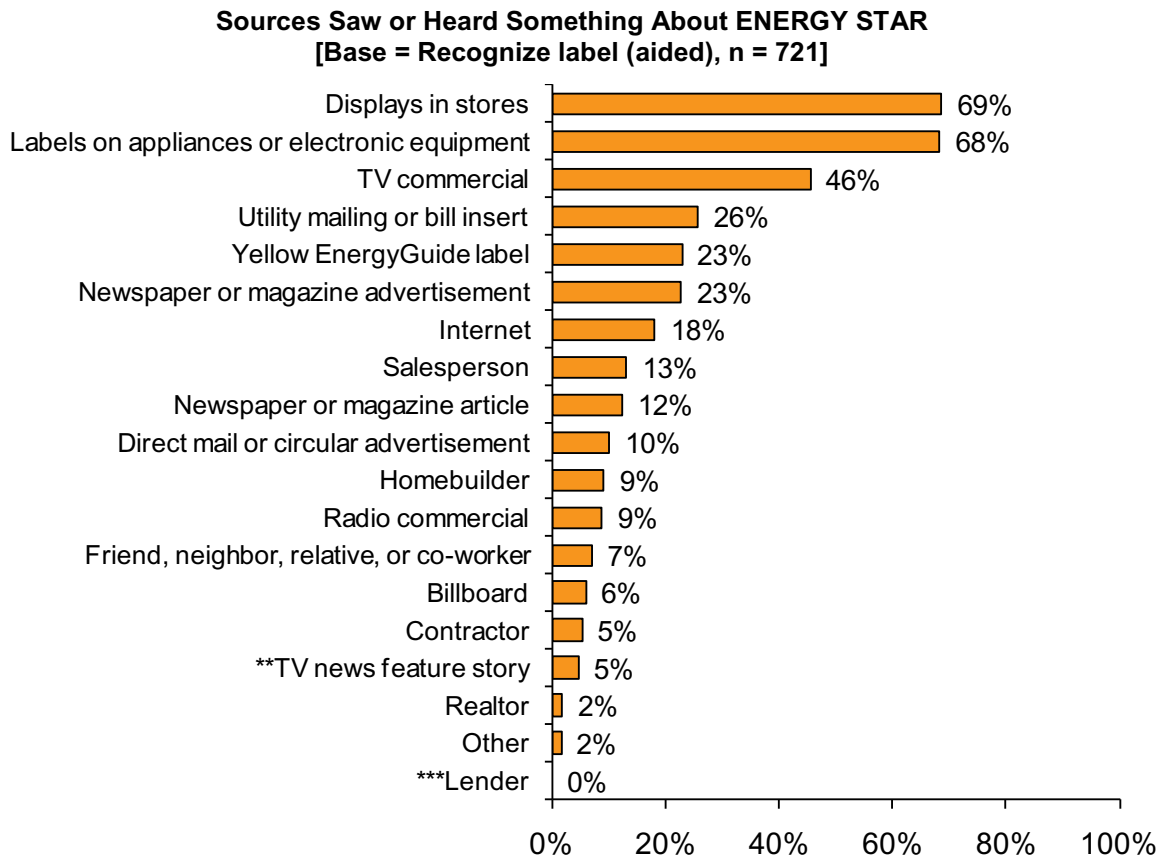
Notes: Q11: “How likely are you to recommend ENERGY STAR-labeled products to a friend?” is measured on an 11-point scale, where 0 = “Extremely unlikely” and 10 = “Extremely likely.”

INFORMATION SOURCES

Sources Seen

Sixty-nine percent of households have seen something about ENERGY STAR in store displays, and 68 percent of households have seen something about ENERGY STAR on appliance or electronics labels. Forty-six percent of households heard or saw something about ENERGY STAR on TV commercials. Between 23 and 26 percent of households saw something about ENERGY STAR on or in utility mailings or bill inserts, EnergyGuide labels, or in newspaper or magazine advertisements.

Significantly fewer households in 2011 than in 2010 saw something about ENERGY STAR in a TV news feature story (5 percent compared to 8 percent). The proportion informed by their lender fell from one percent in 2010 to zero in 2011. All other responses were statistically similar to the proportions from the 2010 survey.



Note: SO1: "Where did you see or hear something about ENERGY STAR? Please mark all that apply."

** 2011 and 2010 proportions are statistically different from each other at the 5-percent level of significance (p-value≤0.05). Proportion of households in 2011 is smaller than in 2010 for TV news feature story.

* 2011 and 2010 proportions are statistically different from each other at the 1-percent level of significance (p-value≤0.01). Proportion of households in 2011 is smaller than in 2010 for Lender.

Sources Seen by Publicity Category

For a couple of information sources, the proportion of households that heard or saw something about ENERGY STAR was significantly larger in high- than in non-high-publicity areas. This was the case for radio commercials and friend, neighbor, relative, or co-worker. Other sources of information are not significantly different between high- and non-high-publicity areas.

Sources Saw or Heard Something About ENERGY STAR by Publicity Category [Base = Recognize label (aided), n = 721]

*** High- and non-high-publicity area proportions are statistically different from each other at the 1-percent level of significance (p-

APPENDIX A: DETAILED METHODOLOGY

During September 2011, the Consortium for Energy Efficiency (CEE) fielded a questionnaire to obtain information at the national level on consumer awareness and understanding of the ENERGY STAR label, the value accrued to the label in the eyes of consumers, satisfaction with labeled products, and other ENERGY STAR-related information. The questionnaire was similar to the Internet/WebTV-based questionnaires fielded in previous years (2001 through 2010). As in the 11 previous years, CEE and its members sponsoring the survey made the survey data available to EPA for analysis. In 2001, a rigorous comparative analysis of the results obtained via a mail survey versus an internet survey was conducted. The results from the two survey methods were comparable for most major indicators.⁷ Results from that time-frame were also analogous to telephone surveys for aided recognition.⁸

This report discusses the results of the 2011 CEE ENERGY STAR Household Survey, building on prior years' survey results and focusing on the extent to which consumers recognized the ENERGY STAR label, understood its intended messages, and utilized (or were influenced by) the label in their energy-related purchase decisions. Research questions of interest included:

- Where do consumers see or hear about the ENERGY STAR label?
- How does increased publicity impact consumer ENERGY STAR label recognition, understanding, and influence?
- Which key messages about the ENERGY STAR label are consumers retaining?
- Do consumers demonstrate loyalty to the ENERGY STAR label?

The survey was fielded from September 27 through October 10, 2011.

The remainder of Appendix A discusses the questionnaire design, sampling and weighting methodologies, data collection, and the national analysis. See Appendix D for survey questions.

1 QUESTIONNAIRE DESIGN

In 2011, CEE conducted the ENERGY STAR survey using a questionnaire designed to be delivered by Internet/WebTV. The survey was conducted via an interactive internet format with a random sample of households that are members of an internet-based panel. Both the panel as a whole and the sample of households completing the survey were selected by address-based sampling (ABS) and

⁷ National Analysis of CEE 2001 ENERGY STAR Household Surveys. U.S. EPA, 2002.

⁸ Tannenbaum, Bobbi and Shel Feldman. "ENERGY STAR Awareness as a Function of Survey Method." IEPEC, 2001.

recruited by telephone.⁹ Participants in this survey were then randomly selected from the panel. Only one member per household in the random sample was contacted. Households selected for previous years' surveys were not eligible to participate in the 2011 survey.

The panel is designed to be representative of the U.S. population. Panel members without their own internet access are provided with a laptop and an Internet service connection. Households that already have Internet service receive other incentives to participate in the panel. Panel members respond to questionnaires administered to them via the internet. They receive no more than three to four short questionnaires each month, and are expected to respond to a certain percentage of them.

Data collected using the 2011 internet questionnaire may in most cases be compared with data collected using the internet questionnaires fielded in previous years, for which CEE was also responsible.

1.1 Survey Objectives

CEE had several broad objectives in designing the 2011 questionnaire, including:

- To maintain consistency with the CEE 2000 and 2001 mail questionnaires and the internet questionnaires fielded in 2001 and subsequent years
- To fine-tune the questionnaire based on lessons learned from prior years' analyses of the CEE survey while maintaining the ability to analyze the results of the 2011 survey against those from the 2010 CEE survey

The 2011 internet questionnaire addressed the following:

- Respondent recognition and understanding of the ENERGY STAR label
- Key messages communicated by the ENERGY STAR label
- Products on which respondents have seen the ENERGY STAR label
- Products that respondents have shopped for or purchased in the past year
- Products that respondents have purchased that displayed the ENERGY STAR label on the product, packaging, or instructions
- Influence of the presence or absence of the ENERGY STAR label on the purchase decision

⁹ In previous years, the panel was recruited via random-digit dial. Knowledge Networks believes that ABS offers advantages, including coverage of cell-phone-only households, and analysis of non-response bias. More information is available at <http://www.knowledgenetworks.com/accuracy/fall-winter2010/abs-fall2010.html>.

- Whether purchases of ENERGY STAR-labeled products involved rebates or reduced-rate financing
- Likelihood of having purchased ENERGY STAR-labeled products in the absence of rebates or reduced-rate financing
- Likelihood of recommending ENERGY STAR-labeled products to a friend and other measures of loyalty to the ENERGY STAR label
- Satisfaction with ENERGY STAR-labeled products versus products without the ENERGY STAR label
- Demographic questions (most of the demographic questions were not asked in the internet survey as the demographic characteristics of the respondents were already on file)
- Recognition and understanding of the yellow EnergyGuide label

1.2 Internet Questionnaire

The interactive format of an internet questionnaire allows questions to be asked in a way that is not possible with a printed questionnaire. On printed questionnaires respondents can see questions in advance and may be tempted to read the entire questionnaire before completing it, potentially educating themselves in a limited way about the subject and affecting their responses.

The internet questionnaires (after questions about the yellow EnergyGuide label) ask respondents—without showing the ENERGY STAR label—whether they have ever seen or heard of the ENERGY STAR label. Responses to this question should thus be comparable to those obtained through a telephone survey. The internet questionnaires then show the ENERGY STAR label(s) (which is not possible with a telephone survey) and ask again about recognition and understanding. As a result, responses to these questions should be comparable to those obtained through a mail survey where respondents are shown the label.

Another difference between a mail questionnaire and an internet questionnaire is that the latter—like a telephone questionnaire using computer-assisted telephone interviewing (CATI)—can program lines of questions based on responses to earlier questions. For example, respondents to an internet questionnaire who say they bought a given product in the past year can then be asked whether that specific product (or its packaging or instructions) had the ENERGY STAR label.

Thus, the internet survey is able to combine some of the attributes of both print and telephone surveys.

1.3 Changes to the Questionnaire

The 2011 questionnaire was very similar to the 2010 questionnaire. The only change to the 2011 questionnaire from the previous year was the addition of a short sequence of questions designed to collect information on recognition and influence of the ENERGY STAR Most Efficient designation. The ENERGY STAR Most Efficient questions are asked at the end of the questionnaire prior to the demographic questions.

The new questions are:¹⁰

Q17: Have you ever seen or heard of ENERGY STAR Most Efficient?

Q18: What does ENERGY STAR Most Efficient mean to you?

Q19: Is this the graphic you have seen or heard of before? [SHOW MOST EFFICIENT DESIGNATION]

Q20: On a scale by the following statement (1 = Strongly Disagree to 5 = Strongly Agree), please indicate how strongly you agree or disagree with the statement. All other things equal, I would buy a product because it is designated as ENERGY STAR Most Efficient.

1.4 Determination of Aided Recognition

In the 2011 analysis, the determination of *aided* recognition was based on the responses to five questions. This is the same sequence and numbering used in the 2010 survey. Specifically:

ES3A: Is this the label you have seen or heard of before? (Respondents were randomly shown either the old or new ENERGY STAR label. This question was asked to respondents who said they had seen or heard of the ENERGY STAR label.)

ES3B: Have you seen or heard of this version of the ENERGY STAR label? (In this question, asked after ES3A, respondents were shown the label not shown in the previous question.)

¹⁰ Appendix D: 2011 Survey Questions and Flow Chart provides a graphical presentation of the survey questions and skip patterns.

ES3C: Please look at the ENERGY STAR label on the left. Have you ever seen or heard of this label? (Respondents were randomly shown either the old or new ENERGY STAR label. This question was asked to respondents who said they had not seen or heard of or didn't know whether they had seen or heard of ENERGY STAR.)

ES3D: Have you seen or heard of this version of the ENERGY STAR label? (In this question, asked after ES3C, respondents were shown the label not shown in the previous question.)

ES6: Now that you had the opportunity to see the ENERGY STAR label, do you recall seeing or hearing anything about it before this survey? (This question was asked to respondents who answered "no" or "don't know" to ES3A and ES3B. It was also asked to all respondents who answered ES3C and ES3D.)

- Respondents who answered ES3A, ES3B, ES3C, ES3D, or ES6 "yes" were categorized as recognizing the ENERGY STAR label (aided).
- Respondents who did not answer ES3A, ES3B, ES3C, or ES3D "yes" and answered ES6 "no," were categorized as not recognizing the label (aided).
- Respondents who did not answer ES3A, ES3B, ES3C, or ES3D "yes" and answered ES6 "don't know" or refused to answer ES6 were not included in the analysis of aided recognition. (Their data were set to missing.)

2 SAMPLING

2.1 Designated Marketing Areas' Publicity Categories

The same publicity classification procedure used in the past 10 years was used in 2011. The original intent of the classification was to be able to assess the effect of local energy efficiency program publicity on awareness. The majority of these local efficiency programs historically have been supported by utility rate-payer funded energy efficiency programming. However, during 2011, some states continued ENERGY STAR appliance rebate programs that were funded by the American Recovery and Reinvestment Act (ARRA) of 2009 and administered via the U.S. Department of Energy. A decision was made to retain the same publicity classification used in the past 10 years and to retain the prior year's publicity classification of the 57 largest DMAs—in essence preserving the historical classification for future study years, which was based on the following criteria:

- **High publicity:** Active local ENERGY STAR program *recently* sponsored by a utility, state agency, or other organization for 2 or more continuous years. The activities must include *sustained* promotions and publicity from non-federal sources.
- **Low publicity:** Federal campaign activities only and no *significant* regional program sponsor activities.
- **Other:** All other DMAs.

The key working definitions are:

- **Recent:** The 2 years of activity must include the time period during which the survey was in the field.
- **Sustained:** The 2 years of activity must be continuous.
- **Significant:** In addition to any direct federal publicity efforts, publicity efforts must include a deliberate and multifaceted regional program sponsor investment in ENERGY STAR programming, such as direct marketing efforts or the creation and distribution of promotional material.

Each of the Top 57 DMAs was classified according to these three criteria, and sampled based on that classification. Although the sample frame was based on the 2011 publicity classifications, given the significant short-term publicity and funding associated with ARRA, for the purpose of this report, *low publicity* and *other publicity* are combined in the analysis and referenced as *non-high-publicity* areas. Another contributing factor to combine these categories in the analysis is that over time, the population of low-publicity DMAs has dropped to about 15 percent, while high-publicity DMAs now account for about half of U.S. television households.

2.2 Sample Design

The survey was a national survey. The sampling frame for this national survey included all households in any DMAs that together accounted for about 70 percent of U.S. television households. As in prior years, to facilitate comparison across years, the national results were based only on data collected from respondents from the 57 largest DMAs.¹¹

In 2011, no CEE member chose to sponsor an oversample, so the stratum grouping the remaining 153 DMAs (developed in 2010) was not revisited this year.

As in previous years' studies, the DMAs in the sampling frame were classified by publicity category, so the effect of local energy efficiency program publicity on national awareness could be considered. The same publicity classification procedure used in the past 10 years was used this year.¹²

Program publicity has expanded over the past eleven years. Originally, high-publicity, low-publicity, and other groups had similar numbers of households, and so the sample was allocated equally among the three groups. In 2010, for the first time, the number of respondents in each stratum was chosen in proportion to that stratum's share of the U.S. population living in DMAs. As in the past for the national sample, the three publicity categories (the top 57 DMAs) comprise 1,000 respondents. This year, the national sample includes another 430 respondents from the Non-Top-57 DMAs.¹³

A list of the large DMAs and their publicity category assignments is provided in the table below. A map that shows the large DMAs and their publicity categories follows.

¹¹ Analysis included in last year's report showed no statistical difference for key metrics between the 57 largest DMAs and all 210 DMAs.

¹² None of the 57 largest DMAs changed publicity category between 2010 and 2011.

¹³ These are not included in the national analysis to maintain consistency with previous years.

Large (Top 57) DMAs¹⁴

Rank	Designated Market Area (DMA)	TV Households 2010-2011		Publicity Category
		Number	% of US	
1	New York	7,515,330	6.484	High
2	Los Angeles	5,666,900	4.889	High
3	Chicago	3,502,610	3.022	High
4	Philadelphia	3,015,820	2.602	Other
5	Dallas-Ft. Worth	2,594,630	2.239	Other
6	San Francisco-Oak-San Jose	2,523,520	2.177	High
7	Boston (Manchester)	2,460,290	2.123	High
8	Atlanta	2,407,080	2.077	High
9	Washington, DC (Hagrstwn)	2,389,710	2.062	High
10	Houston	2,177,220	1.878	Other
11	Detroit	1,883,840	1.625	Other
12	Phoenix (Prescott)	1,881,310	1.623	High
13	Seattle-Tacoma	1,874,750	1.617	High
14	Tampa-St. Pete (Sarasota)	1,795,200	1.549	Other
15	Minneapolis-St. Paul	1,753,780	1.513	High
16	Miami-Ft. Lauderdale	1,580,580	1.364	Other
17	Denver	1,572,740	1.357	Other
18	Cleveland-Akron(Canton)	1,526,200	1.317	Other
19	Orlando-Daytona Bch-Melbrn	1,453,120	1.254	Other
20	Sacramnto-Stkton-Modesto	1,409,400	1.216	High
21	St. Louis	1,258,580	1.086	Other
22	Portland, OR	1,197,780	1.033	High
23	Charlotte	1,166,180	1.006	Other
24	Pittsburgh	1,160,820	1.002	Other
25	Raleigh-Durham (Fayetvll)	1,131,310	0.976	Low
26	Baltimore	1,108,360	0.956	Other
27	Indianapolis	1,106,420	0.955	Other
28	San Diego	1,089,010	0.940	High
29	Nashville	1,039,430	0.897	Low
30	Hartford & New Haven	1,018,770	0.879	High
31	Kansas City	974,820	0.841	Other
32	Salt Lake City	953,950	0.823	High
33	Cincinnati	923,830	0.797	Low
34	Columbus, OH	915,950	0.790	Other
35	Milwaukee	901,100	0.777	High
36	Greenvll-Spart-Ashevll-And	878,550	0.758	Low
37	San Antonio	844,910	0.729	Low
38	West Palm Beach-Ft. Pierce	773,890	0.668	Low
39	Harrisburg-Lncstr-Leb-York	749,020	0.646	Other
40	Birmingham (Ann and Tusc)	747,190	0.645	Low
41	Grand Rapids-Kalmzoo-B.Crk	740,230	0.639	Other
42	Las Vegas	718,030	0.619	High
43	Norfolk-Portsmth-Newpt Nws	716,050	0.618	Low

¹⁴ Publicity categories are the same as 2010.

Rank	Designated Market Area (DMA)	TV Households 2010-2011		Publicity Category
		Number	% of US	
44	Austin	707,430	0.610	High
45	Oklahoma City	704,670	0.608	Low
46	Albuquerque-Santa Fe	703,720	0.607	Other
47	Greensboro-H.Point-W.Salem	699,040	0.603	Low
48	Memphis	693,860	0.599	Low
49	Jacksonville	678,430	0.585	Low
50	Louisville	674,940	0.582	High
51	Buffalo	636,320	0.549	High
52	New Orleans	635,860	0.549	Other
53	Providence-New Bedford	620,600	0.535	High
54	Wilkes Barre-Scranton	595,480	0.514	Low
55	Fresno-Visalia	581,340	0.502	High
56	Little Rock-Pine Bluff	573,670	0.495	Low
57	Richmond-Petersburg	558,500	0.482	Other
Total		82,162,070	70.887	

Large (Top 57) DMAs by Publicity Category¹⁵

2011



¹⁵ There were no large DMAs in either Alaska or Hawaii.

2.3 Weighting Procedures

Knowledge Networks, the company that provided the internet survey service, developed the weights used in the analysis. Knowledge Networks first adjusted its panel members for known disproportions due to the panel's original selection and recruitment design and then proceeded with a post-stratification weighting that accounted for differences between the panel and the U.S. population. The adjustment to this typical sampling weight approach was based on geographic and demographic characteristics known for both the panel and the population (refer to Appendix B). It effectively scales up under-represented population dimensions in the panel and scales down dimensions that are over-represented in the panel. This more closely aligned the panel with the basic demographic characteristics of the U.S. population.

After the field data were collected, Knowledge Networks further adjusted the sampling weight to account for survey non-response. The correction for survey non-response is analogous to the adjustment for differences between the panel members and the U.S. population. It was based on geographic and demographic characteristics known for both the sample of panel survey completes and the entire sampling frame for the study. The weighting scaled up under-represented population dimensions and scaled down over-represented dimensions in the sample of survey completes. This more closely aligned the sample of survey completes with the basic demographic characteristics of the entire sampling frame for the study.

3 DATA COLLECTION

3.1 Survey Fielding Period

The survey began on September 27 and closed on October 10, 2011.

3.2 Response Rate

The overall response rate was 9 percent for the CEE 2011 ENERGY STAR Household Survey. This level of response is typical for Knowledge Networks' surveys.

For an internet survey, the response rate is defined as the product of the *return rate*, which is survey-specific, and the *recruitment rate*. The *return rate* is the ratio of the number of questionnaires completed to the number of panel members asked to complete the questionnaire. For the CEE 2011 ENERGY STAR Household Survey, the return rate was 64 percent. While this number is quite high, it must be adjusted by the *recruitment rate*, which is the number of households that agreed to participate in the Knowledge Networks panel as a proportion of the number of households asked to participate. The recruitment rate was 15 percent. Thus, the response rate for the CEE 2011 ENERGY STAR Household survey was the product of the survey-specific return rate of 64 percent and the recruitment rate of 15 percent. This product is equivalent to the ratio of the number of questionnaires completed to the number of households that were offered the opportunity to be in the study.

CEE 2011 ENERGY STAR Household Survey Response Rate¹⁶

Response Rate Factors	Number or % of Respondents
Sendout/requested	1,591
Completed	1,017
Return rate	64%
Recruitment rate	15%
Response rate	9%

¹⁶ Only respondents from Top-57 DMAs are included in this table.

4 NATIONAL ANALYSIS

4.1 DMAs Included

To facilitate comparisons across years, the national results were based only on data collected from respondents from the 57 largest DMAs.

4.2 Treatment of “Don’t Know” Responses and Refusals

For most questions, how “don’t know” responses or refusals are handled has a negligible effect on the results. Still, it is necessary to make a decision as to how they should be handled. The results presented in this report for a given question do not include “don’t know” responses or refusal to answer (i.e., the results for a given question were calculated after any “don’t know” responses to that question or refusals to answer that question were set to missing).

APPENDIX B: DEMOGRAPHICS

This appendix presents the relationship between the demographic characteristics found in the weighted survey data and the corresponding characteristics in the study population of all U.S. households. Professional survey and data collection firms make significant efforts to ensure the rigor of their methods and to produce the highest quality results. Each year, Knowledge Networks—the company that maintains the internet-based survey panel used in this analysis—strives to create a panel that is representative of the U.S. population. However, as in any survey effort, those who respond to surveys tend to be different from those who do not. In this case, the panel used for this survey may contain subjects that are receptive to the incentive-for-service tradeoff and introduce associated biases.

Weighting used in the analyses of this report is applied to account for differences between the internet-based panel and the U.S. population. If weighting was accomplished perfectly, the distribution of various demographic characteristics in the weighted survey data would be the same as the distribution of those characteristics in national Census data. For most demographic characteristics, the two distributions are quite similar. This suggests the weighted survey results are a reasonable representation of the study population. A summary of the comparisons of demographic characteristics is provided in the table below. Detailed comparisons are provided in tables presented at the end of this appendix.

Summary of Distribution Comparisons

Demographic Characteristic	Largest Difference (Absolute Value): Survey Estimate Less Census %	
Number of persons in household	One	-12.3%
Householder/respondent age	25-34	6.1%
Householder/respondent gender	Gender	+/- 0.5%
Dwelling type	Bldg. (>=2 units)	-4.6%
Own/rent	Own/rent	+/- 1.3%
Household annual income	\$75,000 and over	10.6%

The largest differences (in absolute value) between the weighted survey data and national Census data, at 10 and 12 percentage points, are the proportion of households in the \$75,000 and over income category and the proportion of one person households, respectively. The difference in the proportion of householder/respondent age 25 – 34 years is the next largest, at 6.1 percentage points, and the number of multi-unit dwellings is the next largest, at 4.6 percentage points. The combined under-representation of single-person households and over-representation of higher income households are not expected to bias the survey results in any particular direction. Differences between the weighted survey data and Census data for other demographic characteristics of the population—own/rent, and gender—are all quite small, at less than two percentage points.

Household Size Distribution

Number of Persons in Household	Census % Dwelling Units ^a	Survey Estimate Minus Census % Dwelling Units
One	27%	-12.3%
Two	33%	6.0%
Three	16%	2.9%
Four	14%	1.2%
Five or more	10%	2.3%
Total (%)	100%	
Total (1,000s)	111,806	

^a U.S. Census Bureau, American Housing Survey, 2009, Table 2-9.

Age Distribution

Householder/ Respondent Age	Census % Householders ^a	Survey Estimate Minus Census % Householders
18-24	5%	5.4%
25-34	17%	6.1%
35-44	20%	-4.8%
45-54	21%	-3.2%
55-64	17%	1.8%
65 or older	21%	-5.3%
Total (%)	100%	
Total (1,000s)	111,806	

^a U.S. Census Bureau, American Housing Survey, 2009, Table 2-9.

Gender Distribution

Householder/ Respondent Gender	Census % Population ^a	Survey Estimate Minus Census % Population
Female	51%	0.5%
Male	49%	-0.5%
Total (%)	100%	

^a U.S. Census Bureau, 2006-2010 American Community Survey 5-Year Estimates

Dwelling Type Distribution

Dwelling Type	Census % Dwelling Units ^a	Survey Estimate Minus Census % Dwelling Units
Single-family, unattached	63%	4.1%
Single-family, attached	6%	3.2%
Bldg. (>=2 units)	25%	-4.6%
Mobile home	6%	-2.7%
Total (%)	100%	
Total (1,000s)	113,616	

^a U.S. Census Bureau, American Housing Survey, 2009, Table 2-1.

Own/Rent Distribution

Own/Rent	Census % Households ^a	Survey Estimate Minus Census % Households
Own	68%	1.3%
Rent	32%	-1.3%
Total (%)	100%	
Total (1,000s)	111,806	

^a U.S. Census Bureau, American Housing Survey, 2009, Table 2-1.

Income Distribution

Total Household Annual Income (before taxes)	Census % Households ^a	Survey Estimate Minus Census % Households
Less than \$15,000	13%	-3.2%
\$15,000-\$24,999	12%	-4.5%
\$25,000-\$49,999	25%	-3.2%
\$50,000-\$74,999	18%	0.3%
\$75,000 and over	32%	10.6%
Total (%)	100%	
Total (1,000s)	117,538	

^a U.S. Census Bureau, CPS Annual Social and Economic Supplement 2010, Table HINC-01 Selected Characteristics of Households, by Total Money Income (2009 data)

APPENDIX C: ADDITIONAL QUESTIONS FROM 2011 SURVEY

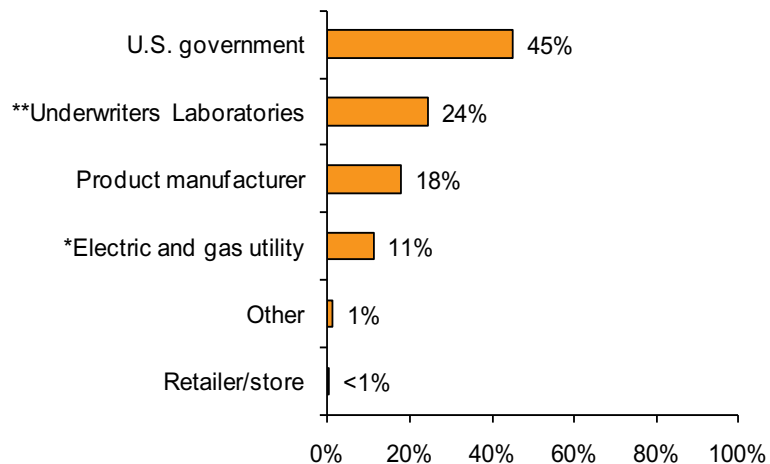
This appendix presents the results of additional ENERGY STAR related questions in the 2011 survey that were added by CEE since 2005; and are not discussed in the main body of the report. Topics included in this appendix include:

- ENERGY STAR Designation
- ENERGY STAR Product Satisfaction
- Consumer Perceptions
- Purchasing Decisions
- CFL Purchaser Questions
- Most Efficient Designation

1 ENERGY STAR DESIGNATION

Forty-five percent of households that recognized the ENERGY STAR label (aided) thought that the U.S. government decides if a product deserves the label. This is statistically similar to the 2010 result. Twenty-four percent thought the Underwriters Laboratories make this decision, up from 18 percent in 2010 (p-value = 0.047). Eighteen percent thought the product manufacturers make the decision.

**Designates ENERGY STAR-Labeled Product
(Base = Recognize label (aided), n=482)**



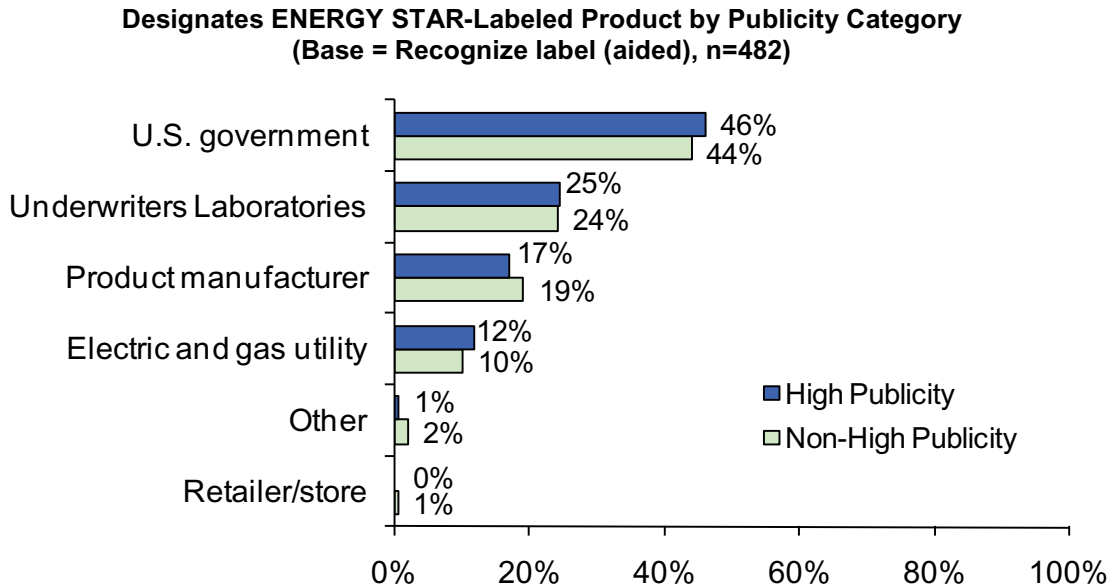
Note: QB: "As far as you know, who decides if a product deserves the ENERGY STAR label?"

** 2011 and 2010 proportions are statistically different from each other at the 5-percent level of significance (p = 0.05). Proportion is larger in 2011 than 2010.

* 2011 and 2010 proportions are statistically different from each other at the 10-percent level of significance (p = 0.10). Proportion is smaller in 2011 than 2010.

2 ENERGY STAR DESIGNATION BY PUBLICITY CATEGORY

In 2011, high-publicity areas and non-high-publicity areas identified the entity that designates the ENERGY STAR label in similar proportions in all categories.



3 ENERGY STAR PRODUCT SATISFACTION

For most products, household satisfaction with a given product in a product category that has an ENERGY STAR specification does not appear to vary based on whether or not the product had an ENERGY STAR label. On a scale of 1 to 5, where 1 means “very dissatisfied” and 5 means “very satisfied,” products with and without the ENERGY STAR label had similar average satisfaction ratings, at 4.1 and 4.0 respectively.

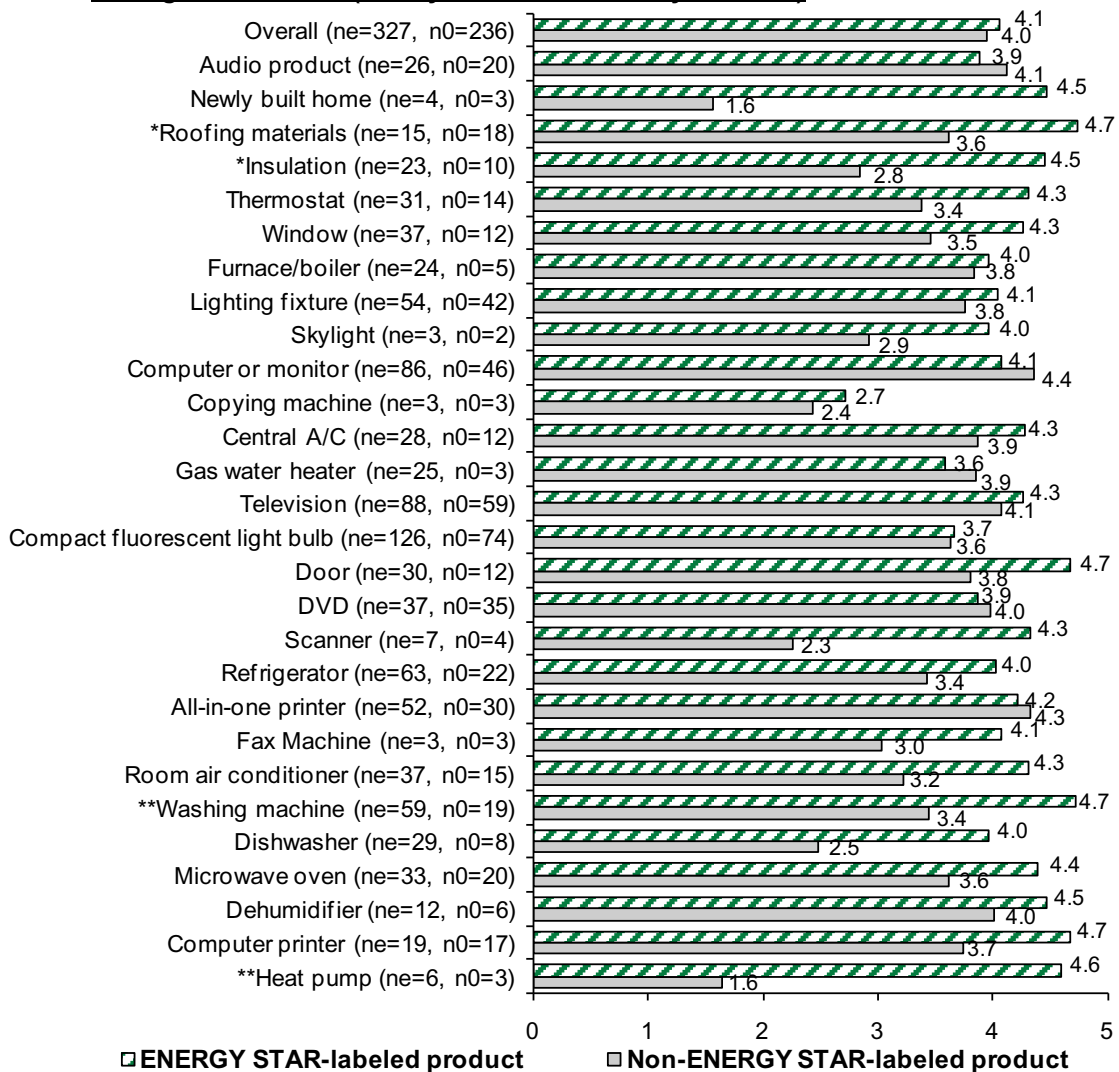
ENERGY STAR-labeled washing machines, heat pumps, roofing materials, and insulation received higher satisfaction ratings compared with unlabeled versions of these products.

Overall, customer satisfaction with ENERGY STAR products was similar in 2010 and 2011, at 4.1. Five ENERGY STAR-labeled products showed a statistically significant increase in customer satisfaction between 2010 and 2011. These products were computer printer, washing machine, heat pump, microwave oven,¹⁷ dehumidifier and door. Two ENERGY STAR-labeled products showed a decrease in customer satisfaction over the same period: compact fluorescent light bulbs and audio products.

¹⁷ There is no ENERGY STAR designation for microwave ovens.

**ENERGY STAR vs. Non-ENERGY STAR-Labeled Product Satisfaction
(Bases = Recognize label (aided) and purchased specified product¹⁸)**

Average Satisfaction (1=very dissatisfied, 5=very satisfied)



- *** ENERGY STAR and Non-ENERGY STAR product proportions are statistically different from each other at the 1-percent level of significance (p-value≤0.01).
- ** ENERGY STAR and Non-ENERGY STAR product proportions are statistically different from each other at the 5-percent level of significance (p-value≤0.05).
- * ENERGY STAR and Non-ENERGY STAR product proportions are statistically different from each other at the 10-percent level of significance (p-value≤0.10).

¹⁸ ne = number of respondents that recognized the label (aided) and purchased this product with an ENERGY STAR label
n0 = number of respondents that recognized the label (aided) and purchased this product without an ENERGY STAR label

4 CONSUMER PERCEPTIONS

Survey respondents that recognized the ENERGY STAR label (aided) were asked to indicate how strongly they agree or disagree with a number of attitudinal statements about ENERGY STAR-labeled products.¹⁹ The statements were shown to respondents in random order.

For purposes of discussion, the statements are grouped into three categories:

- Environmental and social responsibility messaging
- Purchasing preference
- Product attributes and performance

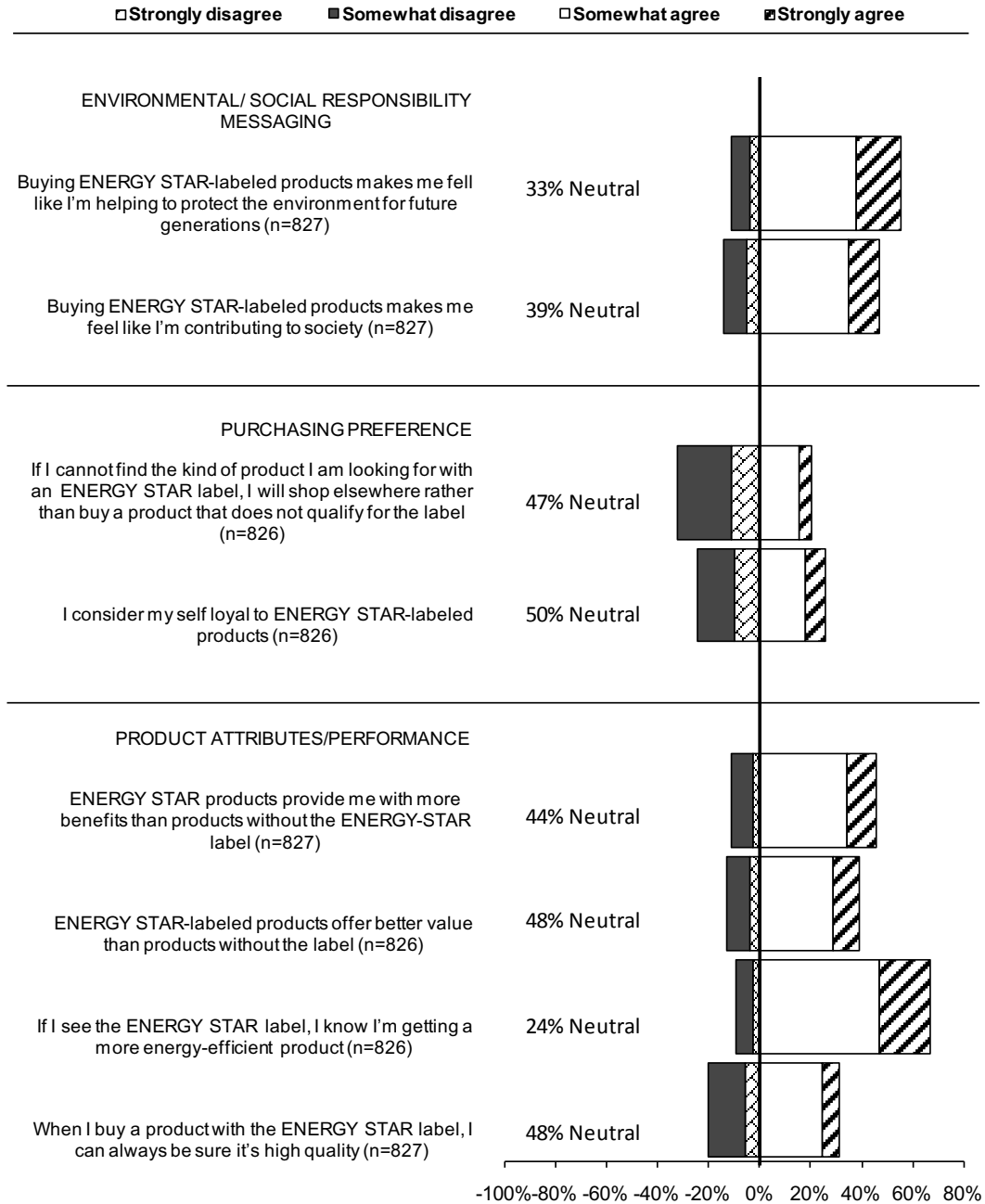
The 2011 survey results indicate that households generally agree with positive statements about the ENERGY STAR label and disagree with negative statements about the label.²⁰ Similar to 2010 results, few statements elicit strong agreement or strong disagreement among substantial proportions of households; in contrast, a number of statements generated neutral responses from a sizeable proportion of households. A more detailed discussion of the findings regarding the attitudinal statements is provided on the following pages.

¹⁹ These statements are numbered Q16a through Q16s in the survey.

²⁰ In this discussion, the term “agree” is used to correspond to survey responses of “strongly agree” or “somewhat agree.” Similarly, the term “disagree” corresponds to survey responses of “strongly disagree” or “somewhat disagree.”

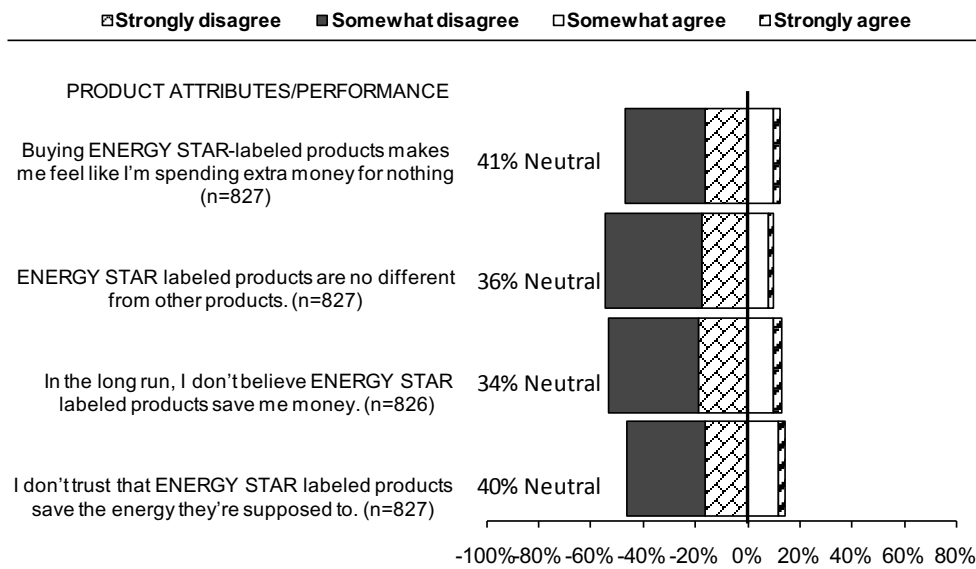
**Response to Categorical Statements Regarding Messaging,
Purchasing, and Product Attributes – Agreement with Positive Statements
(Base = Recognize label (aided))**

For each attitudinal statement, respondents were asked whether they strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree. The response of “neither agree nor disagree” is described as “Neutral” in the chart above and the discussion that follows. In the chart, the results for the “Neutral” response category are shown in text and not depicted in the bar graph. The results for the other four response categories are depicted in the bar graph.



**Response to Categorical Statements Regarding Messaging,
Purchasing, and Product Attributes – Disagreement with Negative Statements
(Base = Recognize label (aided))**

For each attitudinal statement, respondents were asked whether they strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree. The response of “neither agree nor disagree” is described as “Neutral” in the chart above and the discussion that follows. In the chart, the results for the “Neutral” response category are shown in text and not depicted in the bar graph. The results for the other four response categories are depicted in the bar graph.



4.1 Environmental and Social Responsibility Messaging

The development of the environmental and social responsibility messaging of the ENERGY STAR label has been a strong focus of the national ENERGY STAR education campaign. In the 2011 survey, two statements addressed the label's messaging in these areas: "Buying ENERGY STAR-labeled products makes me feel like I'm helping to protect the environment for future generations" and "Buying ENERGY STAR-labeled products makes me feel like I'm contributing to society."

Of the thirteen statements in the survey that explore consumer attitudes toward the ENERGY STAR label and products, these two messages cited above ranked second and third in terms of the proportion of households who strongly agree with the statements. These two statements had the same ranking in the five previous years.

Of households that recognize the ENERGY STAR label, the proportion that either strongly or somewhat agree with the statement that by buying ENERGY STAR-labeled products they feel they are helping protect the environment was unchanged from 2010, at 56 percent. Forty-seven percent of ENERGY STAR aware households strongly or somewhat agree that by purchasing ENERGY STAR-labeled products they feel they are contributing to society, two percentage points more than in 2010; this difference is not statistically significant.

4.2 Purchasing Preferences

Increasing consumers' preferences for purchasing ENERGY STAR-labeled products is also an intended outcome of the national education campaign. In the 2011 survey, two separate statements were included to investigate households' views of their purchasing preferences with respect to ENERGY STAR-labeled products. In 2011, twenty-one percent of households either strongly or somewhat agree with the statement, "If I cannot find the kind of product I am looking for with an ENERGY STAR label, I will shop elsewhere rather than buy a product that does not qualify for the label." This is the same proportion as in 2010. More households (32 percent) either strongly or somewhat disagree, as in 2010. However, the largest proportion of households—47 percent—are neutral in their level of agreement or disagreement with this statement of their purchasing behavior.

Similar to 2010, twenty-six percent of households agree with the second statement addressing households' views of their purchasing preferences: "I consider myself loyal to ENERGY STAR products." Disagreement with this statement was 24 percent, also similar to 2010.

4.3 Product Attributes and Performance

A third goal of the national ENERGY STAR education campaign has been to inform consumers that ENERGY STAR-labeled products are more energy efficient than non-labeled products. The degree to which this goal is being accomplished is addressed in the 2011 survey by asking respondents their level of agreement or disagreement with the statement “If I see the ENERGY STAR label, I know I’m getting a much more energy-efficient product.” Sixty-seven percent of respondents either strongly or somewhat agree with this statement. This indicates a high perception among consumers that the ENERGY STAR label indicates superior performance with respect to energy efficiency relative to products without the label.

The survey addressed perceptions of product quality. Survey respondents were asked the level at which they agreed or disagreed with the statement “When I buy a product with the ENERGY STAR label, I can always be sure it’s high quality.” The results show that 32 percent of households either strongly or somewhat agree with this statement and 48 percent are neutral. Household agreement and disagreement with this statement is similar to last year’s results.

A number of attitudinal statements were included in the survey to measure consumers’ perceptions of ENERGY STAR-labeled product value. One of these statements is “ENERGY STAR products provide me with more benefits than products without the ENERGY STAR label.” The results show that nearly half of households (46 percent) either strongly or somewhat agree with the statement, while only 11 percent of households disagree. On another statement regarding product value, “ENERGY STAR-labeled products offer better value than products without the label,” 39 percent of households either strongly or somewhat agree, while only 13 percent disagree. The proportions of households that agree and disagree with these statements in 2011 are similar to the 2010 results.

The results related to the statement “Buying ENERGY STAR-labeled products make me feel like I’m spending extra money for nothing” provide additional information on perceptions of product value. Here, nearly half (47 percent) of all households who recognize the ENERGY STAR label strongly or somewhat disagree with the statement, while 41 percent of households are neutral. Only 12 percent agree with this statement. The proportions of households that agree and disagree with this statement in 2011 are similar to the 2010 results.

In 2011, the following negative statements about product performance, added in 2010, were included.

- The statement, “I don’t trust that ENERGY STAR-labeled products save the energy they’re supposed to” had only 14 percent agreement, and over three times as much disagreement (46 percent).

- The statement, “In the long run, I don’t believe ENERGY STAR-labeled products save me money” had only 13 percent agreement, and over four times as much disagreement (54 percent).
- Finally, the statement, “ENERGY STAR products are no different from other products” received only 10 percent agreement, and over five times as much disagreement (54 percent).

Forty-eight percent of respondents either somewhat or strongly agree with the statement “It seems like most products have the ENERGY STAR label these days.”²¹ Only 13 percent disagreed with the statement. This suggests people are recognizing the label on many products.

²¹ This statement was deemed neither positive nor negative so it does not appear in the previous chart.

4.4 Consumer Perceptions by Publicity Category

The 2011 results also suggest that local and regional efforts to publicize ENERGY STAR have been successful in affecting consumer perception and recognition of the label. A larger proportion of people in high-publicity areas than non-high-publicity areas agree with the following statements that communicate a positive perception of ENERGY STAR:

- “If I see the ENERGY STAR label, I know I’m getting a more energy-efficient product” (71 percent compared to 62 percent).
- “Buying ENERGY STAR-labeled products makes me feel like I’m helping to protect the environment for future generations” (60 percent compared to 50 percent).
- “Buying ENERGY STAR-labeled products makes me feel like I’m contributing to society” (50 percent compared to 43 percent).
- “If I cannot find the kind of product I am looking for with an ENERGY STAR label, I will shop elsewhere rather than buy a product that does not qualify for the label” (23 percent compared to 17 percent).

A larger proportion of people in high-publicity areas than non-high-publicity areas also agree with the following statement relating to recognition of ENERGY STAR products:

- “It seems like most products have the ENERGY STAR label these days” (51 percent compared to 43 percent).

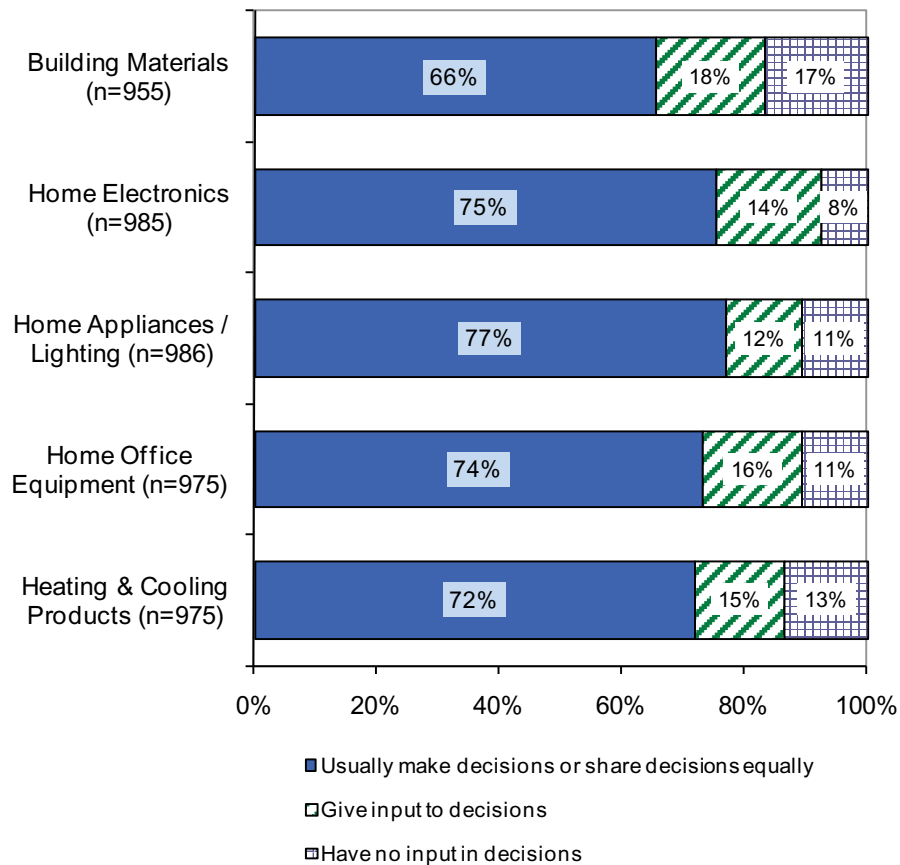
Although a larger proportion of people in high- than non-high publicity areas disagree with the following two positive statements regarding ENERGY STAR, most respondents agree or are neutral with respect to these statements in both high- and non-high publicity areas.

- “ENERGY STAR-labeled products provide me with more benefits than products without the ENERGY-STAR label” (13 percent compared to 8 percent disagree).
- “ENERGY STAR-labeled products offer better value than products without the label” (16 percent compared to 9 percent disagree).

5 PURCHASING DECISIONS

At the end of the survey, respondents were asked to characterize their role in the household purchasing decisions. The results indicate that the vast majority of those represented are primary decision makers, meaning they usually make household purchasing decisions alone or share equally in these decisions. As can be seen below, this varies little across product categories. Seventy-seven percent of individuals were primary decision makers for their household's home appliances/lighting purchases; 66 percent were primary decision makers for purchase of building materials.

Role in Household Purchasing Decisions
(Base = All respondents)



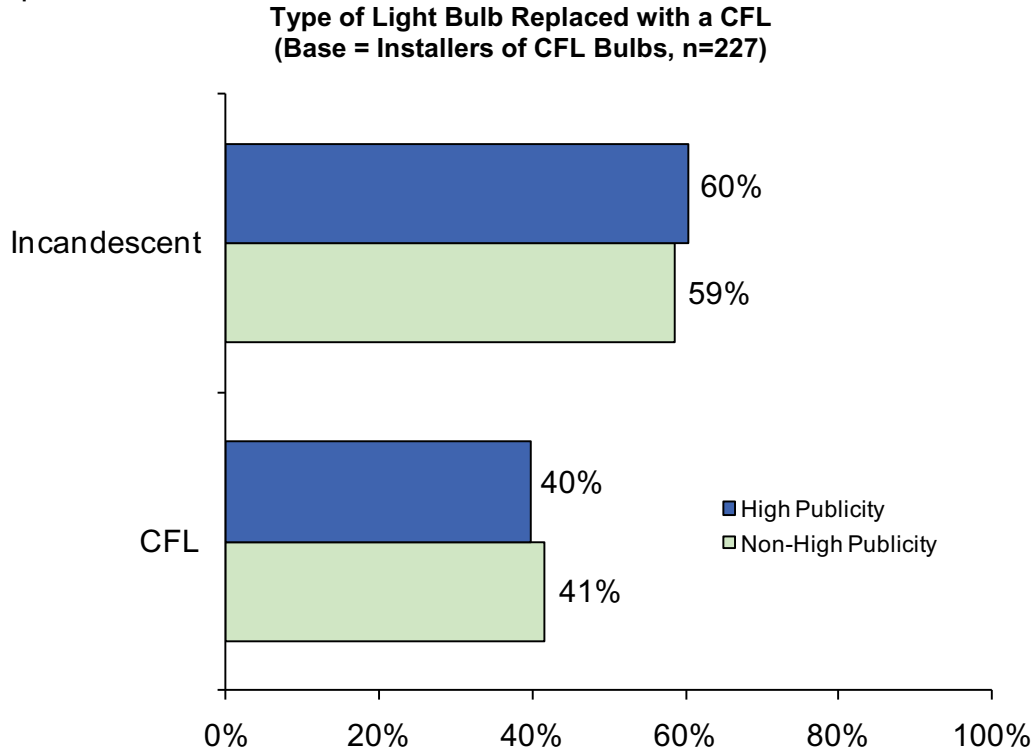
6 CFL PURCHASER QUESTIONS

Similar to previous years, all respondents are asked what products they have purchased in the last 12 months, with additional questions being asked of those who purchased compact fluorescent light bulbs (CFLs) and fixtures. In 2011, 22 percent and 10 percent of all households purchased CFLs and fixtures, respectively.

Respondents that purchased CFLs were asked the following questions:

- “Did you install the compact fluorescent light bulb(s) you purchased in a light fixture?”
 - If yes, then ask “Which type of bulb(s) did you replace?”

An overwhelming majority (93 percent) of CFL purchasers indicated they installed the purchased CFL. This result did not vary significantly by publicity category. Respondents that installed CFLs were then asked if the purchased CFL was used to replace a CFL or an incandescent light bulb. In 2011, 59 percent of households replaced an incandescent light bulb with the purchased CFL and 41 percent of households replaced a CFL with a purchased CFL. These proportions are larger than in 2010 but the differences are not statistically significant at the 10-percent level. Similar to last year, the difference between proportions of households in high- and non-high-publicity areas that replaced incandescent bulbs is not significant at the 10-percent level.



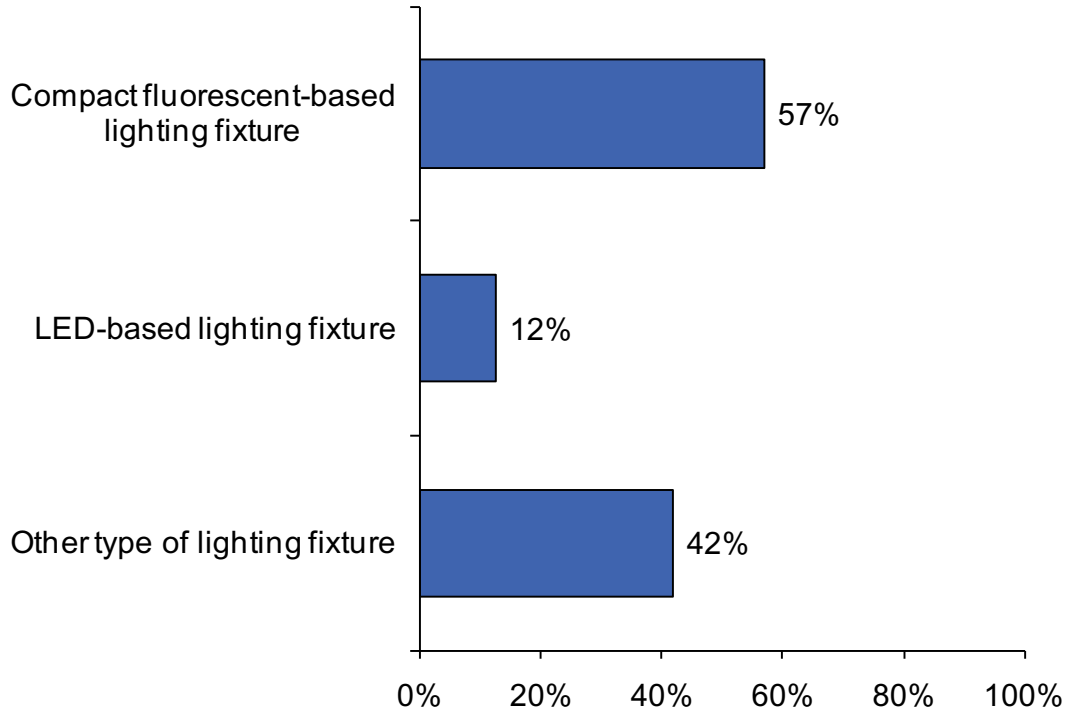
Note: Q12(e) “Which type of bulb(s) did you replace?”

Consistent with previous years, purchasers that recognize the ENERGY STAR label are asked if they saw the label on the product(s) they purchased. Respondents that reported purchasing an ENERGY STAR-labeled lighting fixture were asked:

- “Which kind of ENERGY STAR-labeled lighting fixture did you purchase?”

Fifty-seven percent of ENERGY STAR-labeled lighting fixture purchasers report purchasing a compact fluorescent-based lighting fixture. This result varies by publicity category: in high-publicity areas, 71 percent report purchasing a compact fluorescent-based lighting fixture compared to 32 percent in non-high publicity areas. This difference is statistically significant at the 10 percent level.

Type of ENERGY STAR-Labeled Lighting Fixture Purchased
(Base = Purchasers of ENERGY STAR Lighting Fixture, n=30)



Note: Q8A 1-4. Which kind of ENERGY STAR-labeled lighting fixture did you purchase?

7 ENERGY STAR MOST EFFICIENT QUESTIONS

The 2011 questionnaire added a brief series of questions to collect information on recognition and influence of the ENERGY STAR Most Efficient designation. In 2011, nineteen percent of respondents indicated they had seen or heard of ENERGY STAR Most Efficient. Of those respondents who had seen or heard of ENERGY STAR Most Efficient, just over half (52 percent) recognized the ENERGY STAR Most Efficient graphic when it was shown to them.

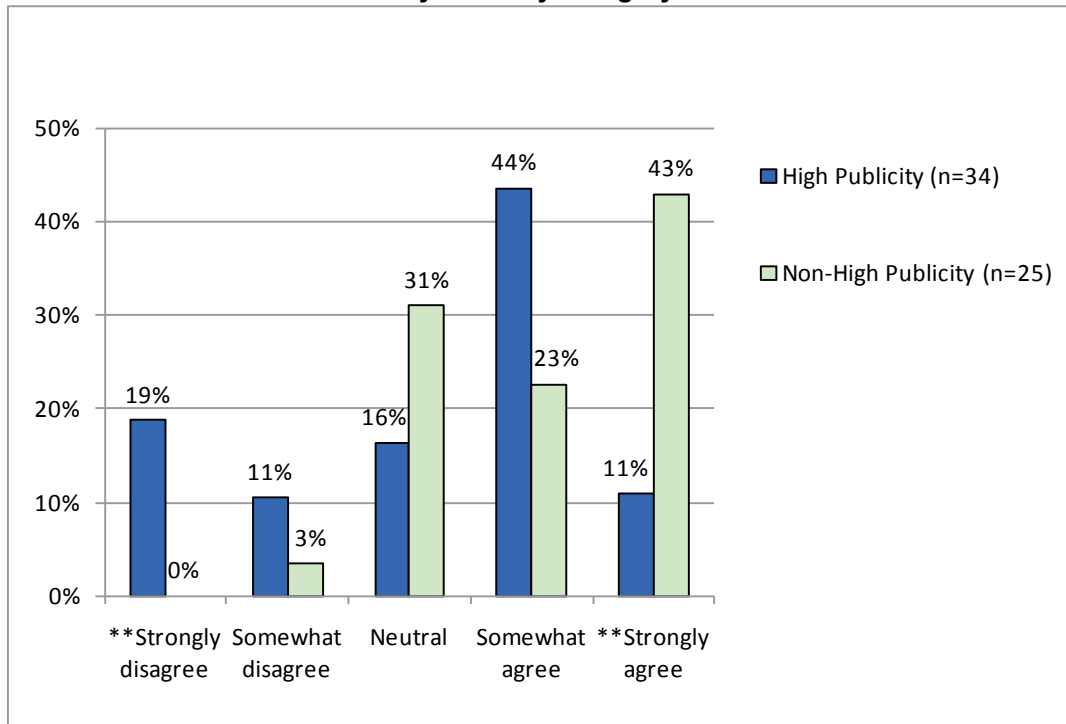
Among respondents who had seen or heard of ENERGY STAR Most Efficient and recognized the Most Efficient graphic, 59 percent agreed (either somewhat or strongly) with the statement that “All other things equal, I would buy a product because it is designated as ENERGY STAR Most Efficient,” while 19 percent disagreed.

Response to Statement Regarding Purchase of ENERGY STAR Most Efficient Product (Base= Recognize Most Efficient graphic)

Would buy a product because it is ENERGY STAR Most Efficient	2011 (n=59)
Strongly disagree	11%
Somewhat disagree	8%
Neither agree nor disagree	22%
Somewhat agree	35%
Strongly agree	24%

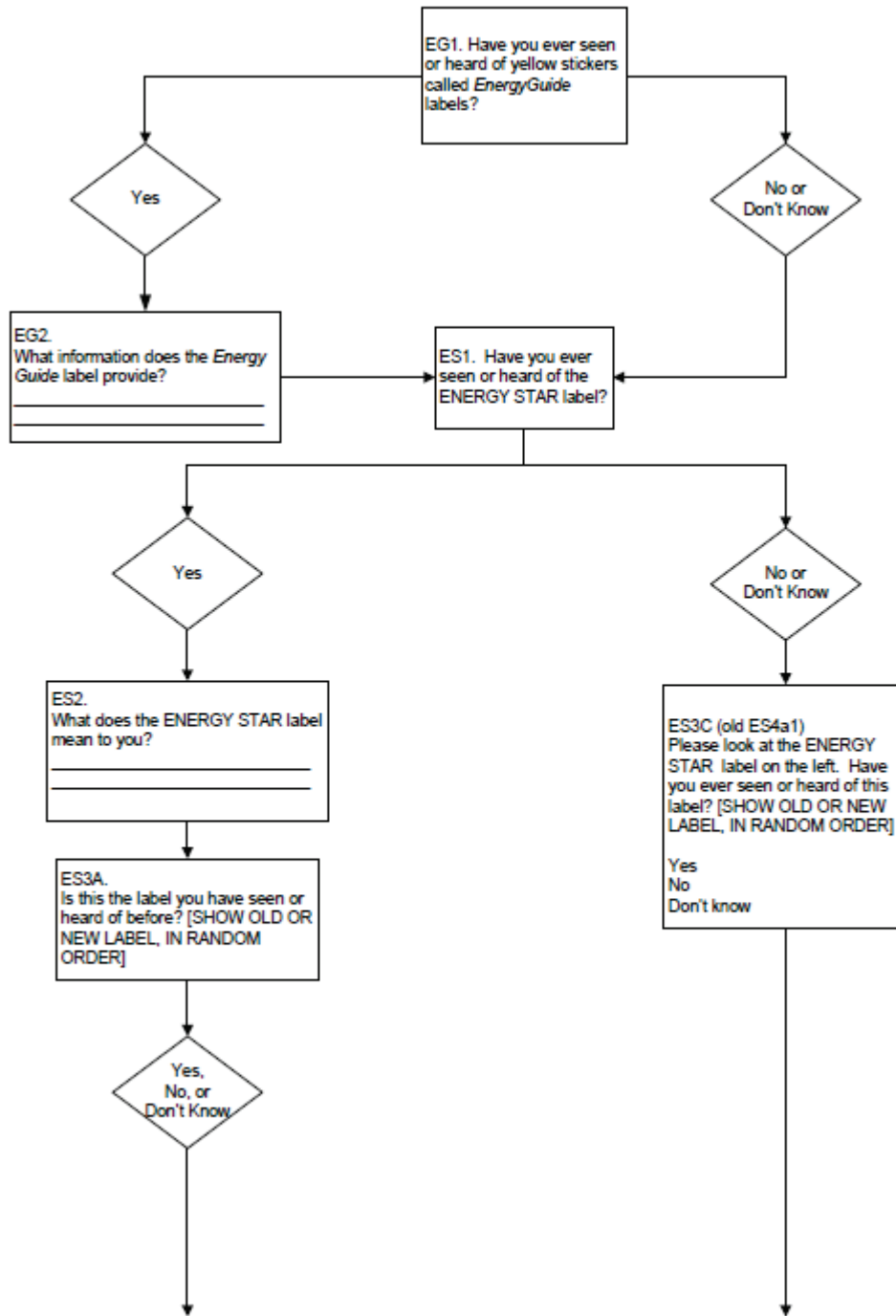
Comparing responses to this statement across high-publicity areas and non-high-publicity areas reveals some differences. However, it should be noted that the number of respondents for these questions is fairly small (34 high-publicity, 25 non-high-publicity). A smaller proportion of people in high-publicity areas than non-high-publicity areas strongly agree with the statement that “All other things equal, I would buy a product because it is designated as ENERGY STAR Most Efficient,” and a larger proportion in high-publicity areas than non-high-publicity areas strongly disagree with that statement. These differences are statistically significant at the 5 percent level.

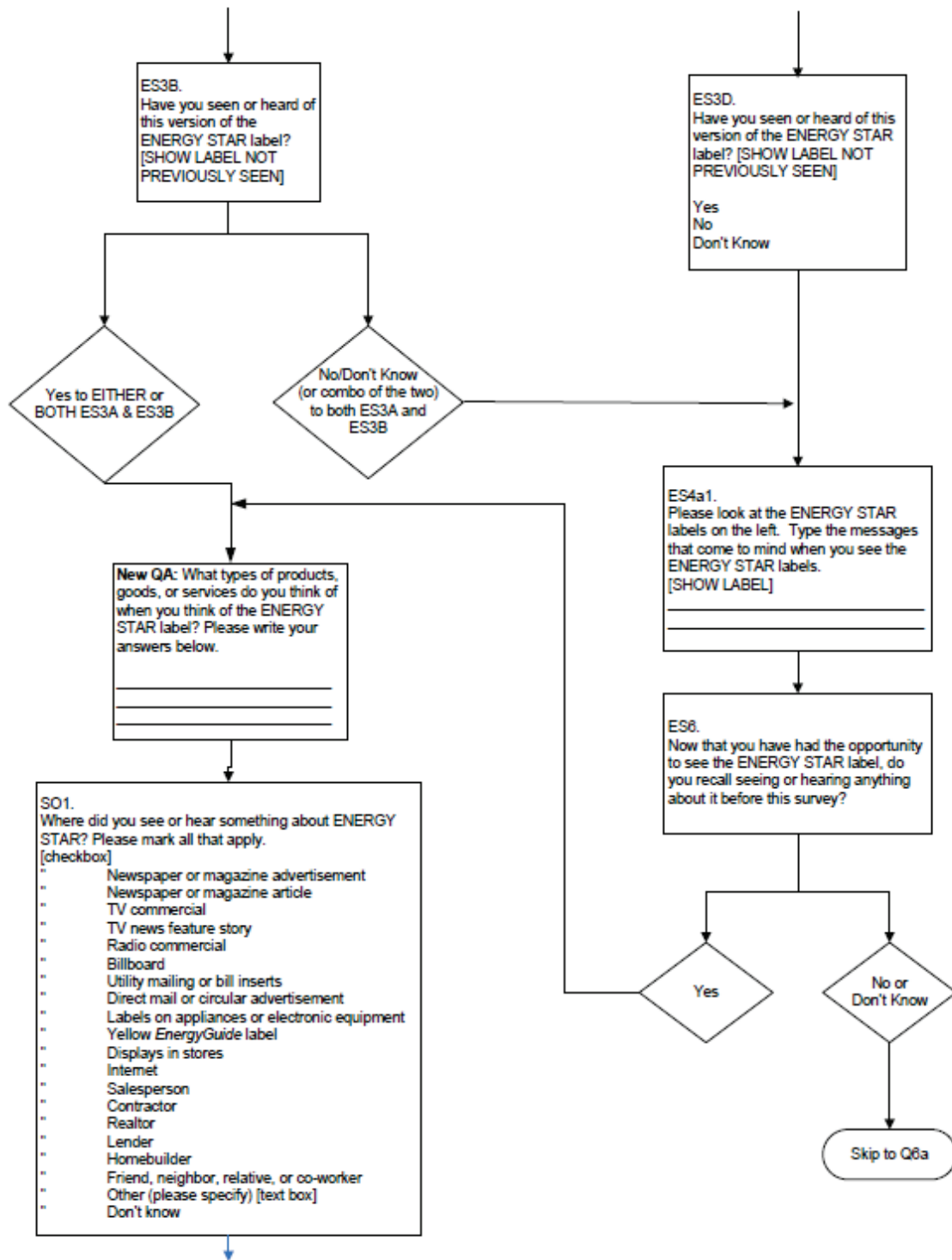
Response to Statement Regarding Purchase of ENERGY STAR Most Efficient Product by Publicity Category



** High- and non-high-publicity area proportions are statistically different from each other at the 5-percent level of significance (p-

APPENDIX D: 2011 SURVEY QUESTIONS AND FLOW CHART





S02.
What did you see or hear about ENERGY STAR? Please be specific.

New QB: As far as you know, who decides if a product deserves the ENERGY STAR label? Select one answer only.

Product manufacturers
Retailers/stores
US Government
Underwriters Laboratories
Electric & gas utilities
Other: _____
Don't know

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
Gas water heater	All-in-one printer (includes copier/scanner/fax)
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	DVD product (including TV/DVD)
Lighting fixture	Audio product
Washing machine	
Compact fluorescent light bulb	
Microwave oven	
Dehumidifier	
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	

Q8a1
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?

Heating and Cooling Products				
Room air conditioner	Yes	No	Don't know	
Home Appliances/Lighting				
Dishwasher	Yes	No	Don't know	
Refrigerator	Yes	No	Don't know	
Lighting fixture	Yes	No	Don't know	
Washing machine	Yes	No	Don't know	
Compact fluorescent light bulb	Yes	No	Don't know	
Home Electronics				
Television	Yes	No	Don't know	
DVD product (including TV/DVD)	Yes	No	Don't know	
Audio product	Yes	No	Don't know	

Q8a2
Have you or someone else in your household been shopping in a store in the last 12 months for any of these other products listed below?

Yes
No
Don't know

Heating and Cooling Products	
Thermostat	
Gas water heater	
Home Office Equipment	
Computer or monitor	
Computer printer	
Copying machine	
Fax machine	
Scanner	
All-in-one printer	
(includes copier/scanner/fax)	
Home Appliances/Lighting	
Microwave oven	
Dehumidifier	
Building Materials	
Window	
Door	
Skylight	
Insulation	
Roofing material	

Q8b
Have you or someone else in your household been shopping for a central air conditioner, furnace or boiler, heat pump or newly built home in the last 12 months?

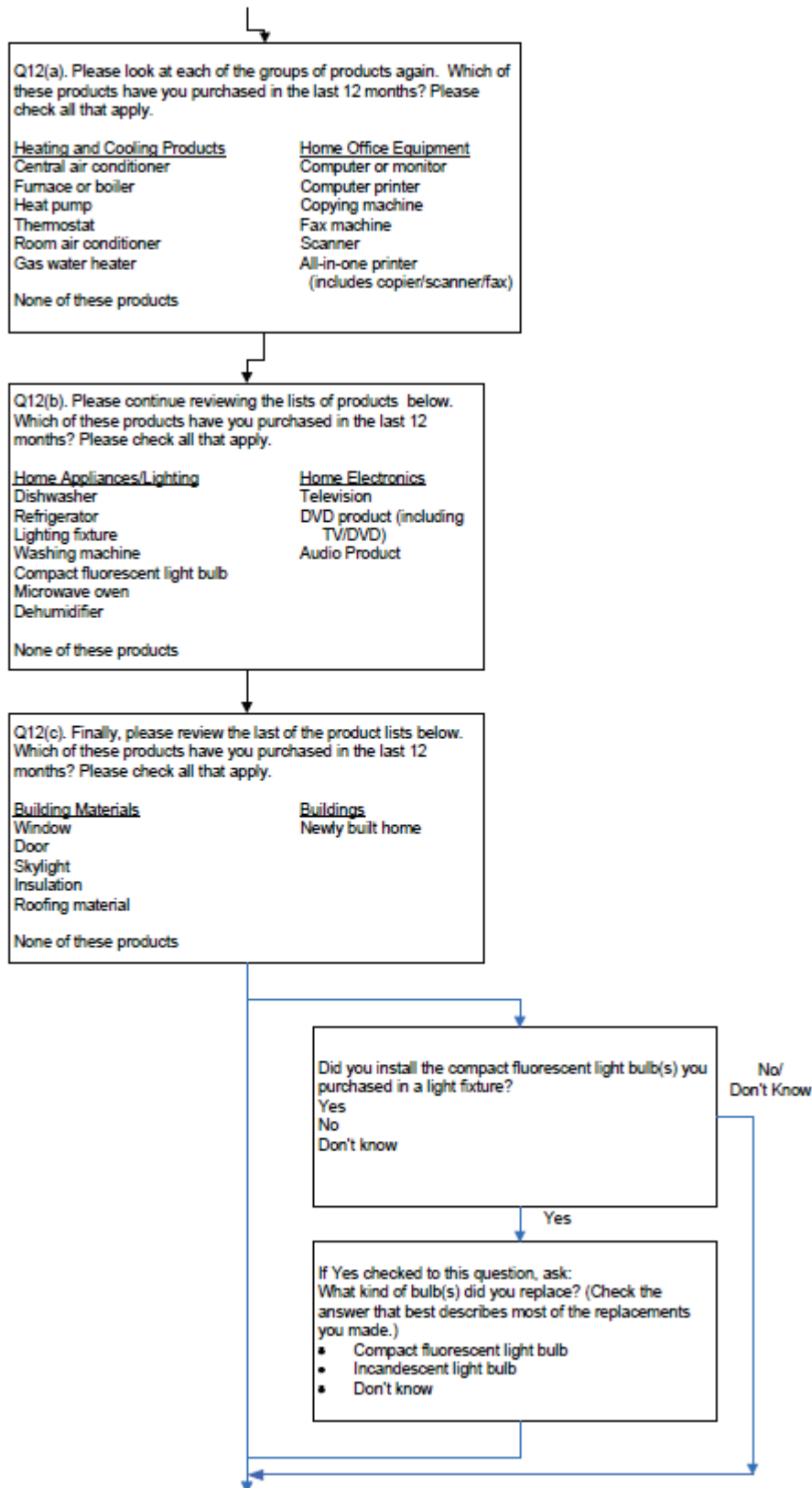
Yes
No
Don't know

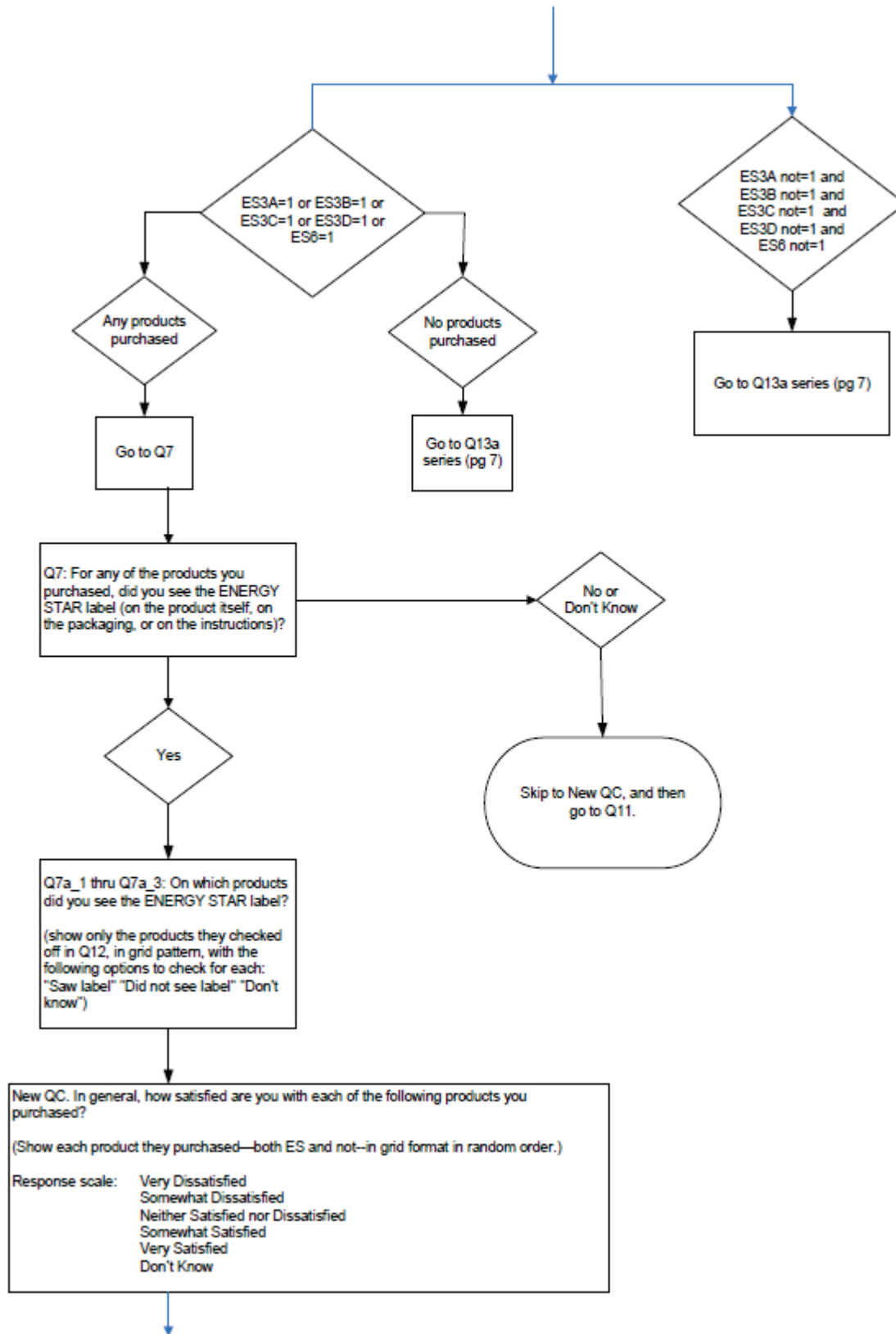
For each product for which Yes was checked in the Q8a1 series, ask:

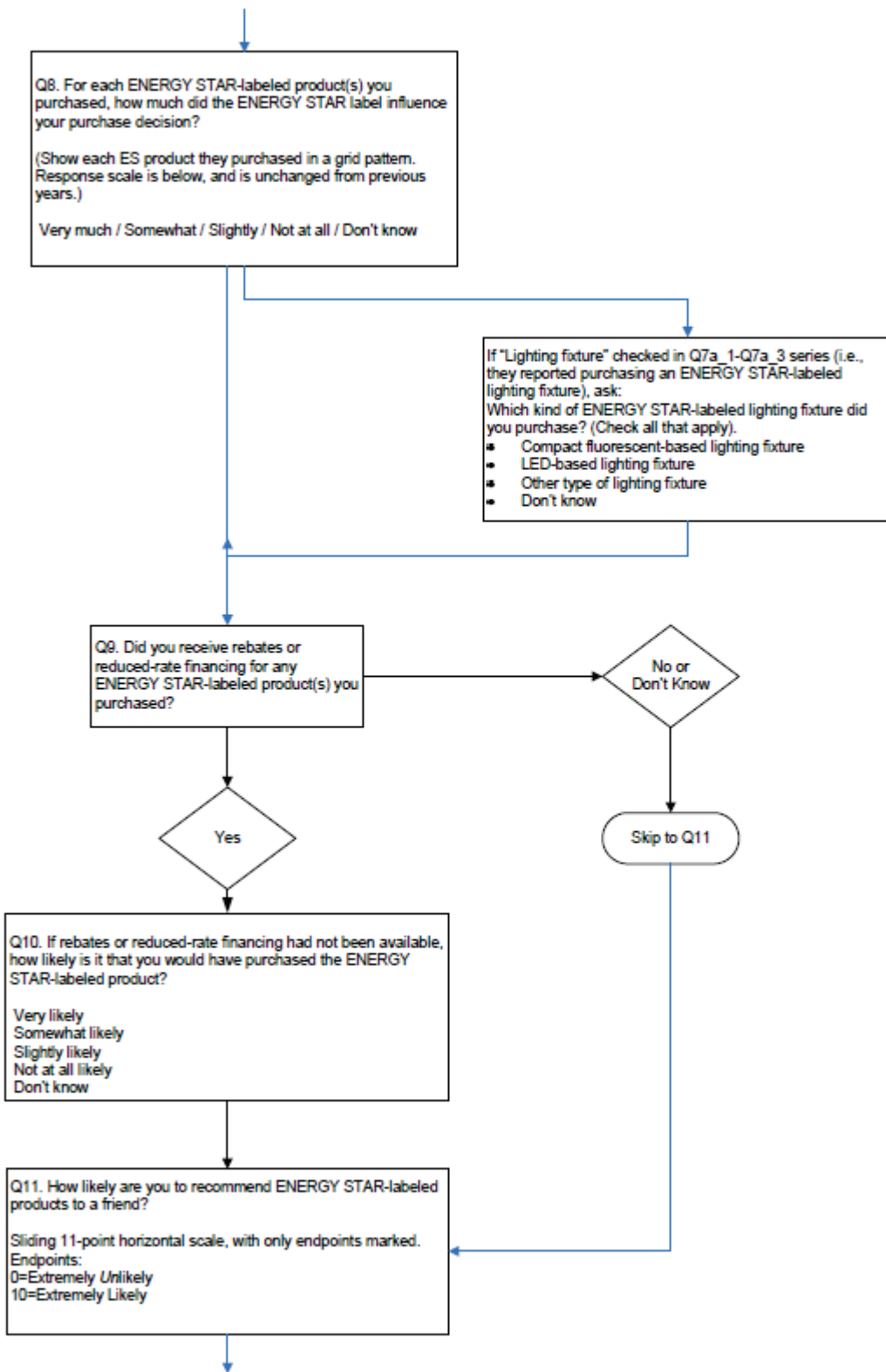
When you shopped for _____, did you look for the ENERGY STAR label?
Yes No Don't remember I did not shop for this product myself

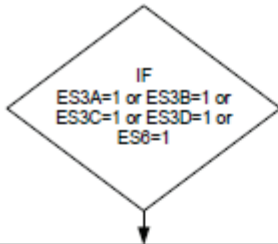
When you shopped for _____, did you ask a salesperson for a product with the ENERGY STAR label?
Yes No Don't remember I did not shop for this product myself

a room air conditioner
a dishwasher
a refrigerator
a lighting fixture
a washing machine
compact fluorescent light bulbs
a television
a DVD product
an audio product

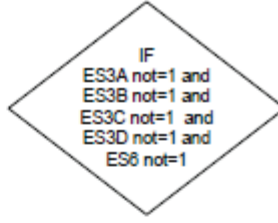








Note: These two diamonds are the same as on page 5.



On the scale by each statement, please indicate how strongly you agree or disagree with the statement.
(Note to programmer: present Q16a through Q16s in random order for each respondent.)

	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
Q16a. ENERGY STAR-labeled products provide me with more benefits than products without the ENERGY STAR label.	1	2	3	4	5
Q16c. ENERGY STAR-labeled products offer better value than products without the label.	1	2	3	4	5
Q16d. If I cannot find the kind of product I am looking for with an ENERGY STAR label, I will shop elsewhere rather than buy a product that does not qualify for the label.	1	2	3	4	5
Q16f. Buying ENERGY STAR-labeled products makes me feel like I'm helping to protect the environment for future generations.	1	2	3	4	5
Q16h. Buying ENERGY STAR-labeled products makes me feel like I'm contributing to society.	1	2	3	4	5
Q16i. Buying ENERGY STAR-labeled products makes me feel like I'm spending extra money for nothing.	1	2	3	4	5
Q16l. I consider myself loyal to ENERGY STAR-labeled products.	1	2	3	4	5
Q16n. It seems like most products have the ENERGY STAR label these days.	1	2	3	4	5
Q16o. If I see the ENERGY STAR label, I know I'm getting a more energy-efficient product.	1	2	3	4	5
Q16p. When I buy a product with the ENERGY STAR label, I can always be sure it's high quality.	1	2	3	4	5
Q16q. ENERGY STAR-labeled products are no different from other products.	1	2	3	4	5
Q16r. In the long run, I don't believe ENERGY STAR-labeled products save me money.	1	2	3	4	5
Q16s. I don't trust that ENERGY STAR-labeled products save the energy they're supposed to.	1	2	3	4	5

Q16a. Please tell us about your role in your household's purchasing decisions. For each of the product groups listed below, do you usually make the purchasing decisions, do you share the decision-making equally with another household member, does someone else usually make the decisions but you have some input, or do you have no input in the decision-making?

	I usually make the decisions	I share the decision-making equally	Someone else usually makes the decisions, but I have some input	I have no input in decision-making	I'm not sure
Heating and Cooling Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Office Equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Appliances/Lighting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Electronics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building Materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

