# NATIONAL ANALYSIS OF CEE 2002 ENERGY STAR® HOUSEHOLD SURVEY

## FINAL REPORT

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## EXECUTIVE SUMMARY

In the fall of 2002, the Consortium for Energy Efficiency (CEE) and a number of its members sponsored the third 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, product purchases, and information sources used by consumers in their purchasing decisions. CEE members in New England chose to supplement the national sample in their territories by conducting additional surveys in Massachusetts. As in the two previous years, CEE and the sponsoring members made the survey data publicly available.

This report discusses the results of the CEE 2002 ENERGY STAR Household Survey, building on prior years' survey information and focusing on the extent to which consumers recognized the ENERGY STAR label, understood its intended messages, and used (or were influenced by) the label on their energy-related purchasing decisions. Research questions of interest included:

- Where do consumers see or hear about the ENERGY STAR label?
- How does increased publicity impact 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?

## Key Findings at the National Level

- Forty-one percent of households recognize (with a visual aid) the ENERGY STAR label.
- Fifty-eight percent of households have a high or general understanding of the label.
- Of households that recognized the ENERGY STAR label and purchased a product in the last twelve months, 60 percent purchased an ENERGY STAR product.
- Considering households that recognized the label and those that did not (i.e., all households), 17 percent of households knowingly purchased an ENERGY STAR-labeled product in the last twelve months.
- For 46 percent of households that knowingly purchased an ENERGY STAR-labeled product, the presence of the label influenced their purchasing decision "very much" or "somewhat." For another 21 percent of households, the presence of the label influenced their purchasing decision "slightly."
- Thirteen percent of households that knowingly purchased an ENERGY STAR-labeled product received a financial incentive. Ninety-two percent of these households would have been "very likely" (40 percent) or "somewhat likely" (52 percent) to purchase the labeled product without the financial incentive.
- Sixty-three percent of households that knowingly purchased an ENERGY STAR-labeled product were "very likely" or "somewhat likely" to recommend labeled products to a friend, and another 23 percent were "slightly likely."

## Key Findings from Publicity-level Analyses

- A larger proportion of households in high- than in low-publicity areas recognize the ENERGY STAR label, both with and without a visual aid. High-publicity areas are areas with active ENERGY STAR promotions by a regional program sponsor for two or more years.
- Considering households that recognized (with a visual aid) the label, a larger proportion of these households in high- than in low-publicity areas associate the ENERGY STAR label with products heavily promoted by regional program sponsors.
- A larger proportion of households in high- than in low-publicity areas have at least a general understanding of the ENERGY STAR label.

- Considering the messages of the ENERGY STAR label, a larger proportion of households in high- than in low-publicity areas associate the ENERGY STAR label with "a specific product." Also, a smaller proportion of households in high- than in low-publicity areas associate the label with "energy conservation."

- A larger proportion of households in high- than in low-publicity areas knowingly purchased an ENERGY STAR product within the last 12 months.

- Considering households that knowingly purchased an ENERGY STAR-labeled product, a larger proportion of these households in high- than in low-publicity were at least somewhat influenced by the label.

- Considering households that recognized (with a visual aid) the label, a larger proportion of these households in high- than in low-publicity areas have seen or heard something about ENERGY STAR on both TV commercials and utility mailings or bill inserts.

**Conclusions and Future Directions**

This third national study of household awareness of the ENERGY STAR label confirms key findings from the previous years' surveys: substantial portions of the U.S. households in the surveyed population recognize, understand, and are influenced by the ENERGY STAR label; and publicity from active regional energy efficiency program sponsors increases recognition, understanding, and influence of the label.

The overall trend for the 2002 data represents movement in the correct direction. A statistically measurable change or trend in the key indicators (e.g., recognition, understanding or influence of the ENERGY STAR label) may only be observable after several years (e.g., more than two years). For a change in awareness between 2001 and 2003 to be statistically significant at the 90 percent confidence level, awareness would need to change by at least 4.25 percentage points (assumes the standard error in 2003 is similar to the standard error in 2002).

In addition, measurable growth in the key indicators, such as recognition, understanding, and influence, is also affected by the survey's sample methodology, which focuses on respondents in the 57 largest media markets (representing 70 percent of TV households). While providing a valuable national analysis, this focus does not capture fully any increases in recognition and understanding in the smaller cities, which are well covered by regional programs. This is important to note, because the higher awareness in high publicity areas indicates that regional programs are effectively communicating the ENERGY STAR message.

## INTRODUCTION

In the fall of 2002, the Consortium for Energy Efficiency (CEE) sponsored the third 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, product purchases, and information sources used by consumers in their purchasing decisions. CEE members chose to supplement the national sample in their territory by conducting additional surveys in Massachusetts. As in the two previous years, CEE and sponsoring members made the survey data publicly available.

This report discusses the results of the CEE 2002 ENERGY STAR Household Survey, building on prior years' survey information and focusing on the extent to which consumers recognized the ENERGY STAR label, understood its intended messages, and used (or were influenced by) the label on their energy-related purchasing decisions. Research questions of interest included:

- Where do consumers see or hear about the ENERGY STAR label?
- How does increased publicity impact 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?

This report has two parts. Part I includes an Executive Summary, this introduction, a summary of methods, key findings in four sections, and three appendices. Appendix A is the Detailed Methodology, Appendix B considers Demographic Information from the 2002 WebTV survey, and Appendix C provides a copy of the 2002 WebTV questionnaire. Part II presents the 2002 WebTV survey results by publicity category. In all cases, the results presented are properly weighted to obtain national estimates.

## METHODOLOGY

From August through September 2002, the Consortium for Energy Efficiency (CEE) designed and fielded a household survey to obtain information at the national level on consumer awareness of the ENERGY STAR label. The survey was delivered by WebTV and was similar to the 2001 WebTV survey. As in the previous two years, CEE and the sponsoring members made the survey data publicly available.

The survey was a national survey. The sampling frame for the survey is all households in the largest Nielsen Designated Market Areas (DMAs) that account for approximately 70 percent of U.S. television households. In 2002, the 57 largest DMAs account for approximately 70 percent of U.S. television households. In addition, selected CEE members sponsored more intensive sampling (an oversample) for one state, Massachusetts, which is referred to here as a "sponsor area." For the sponsor area, the frame was not limited to the large DMAs, but included the entire state. Thus, the complete frame for the study was the combination of the largest DMAs and any portion of the sponsor area that fell outside these DMAs.

As in previous years' studies, to consider the effect of publicity on national awareness, the DMAs in the complete frame were classified by publicity category. The same publicity classification procedure used last year was used this year. In both 2001 and 2002, a DMA was classified as high publicity, low publicity, or other using the following criteria:

- **High publicity:** At least two *recent* years of *sustained* promotions and publicity from non-federal activities
- **Low publicity:** Federal campaign activities only and no *significant* regional program sponsor activities
- **Other:** All other DMAs

This classification procedure identifies three publicity categories and provides clear and verifiable definitions. The key working definitions are:

- **Recent:** The two years of activity must include the time of the survey fielding
- **Sustained:** The two years of activity must be continuous

- **Significant**: In addition to any direct federal publicity efforts[1], publicity efforts must include a deliberate and multifaceted regional program sponsor investment in ENERGY STAR programming, such as direct marketing and promotional efforts

These definitions are sufficiently operational to be applicable to future survey efforts, and can be modified by simply increasing the duration of sustained high publicity.

The sample is stratified by publicity category and sponsor area. The three publicity categories and one sponsor area result in four strata. Households in the largest or parts of the largest DMAs that were not in the sponsor area, were assigned to one of the publicity category strata. Households in the sponsor area were assigned to the sponsor area stratum. Each publicity category stratum was allocated approximately 266 sampling points. The CEE members who funded the oversample for the sponsor area determined the number of sampling points allocated to their stratum.

This report presents the 2002 survey results at the national level and often by publicity category. The publicity category results provide evidence on the effectiveness of EPA's model to increase awareness of ENERGY STAR by supporting regional program sponsors. Results are presented on consumer recognition, understanding, and purchasing influence of the ENERGY STAR label, as well as on messaging, product purchases, and information sources used by consumers in their purchasing decisions.

[1] During the September 2001 to September 2002 period, EPA launched the first of three new television national Public Service Announcements (PSAs) as part of its *Change* campaign. The *Change* campaign also included continued distribution of several radio and print PSAs as a component of its overall outreach strategy.

## RECOGNITION

In 2002, 41 percent of households recognized the ENERGY STAR label when shown the label (i.e., aided recognition). Approximately 28 percent of households correctly assessed whether or not they had seen or heard of the ENERGY STAR label without first being shown the label (i.e., unaided recognition).

For purposes of this analysis, respondents are said to recognize the ENERGY STAR label if they have seen or heard of the label before the survey. Recognition of the ENERGY STAR label was explored two different ways. "Aided" recognition was measured by showing the label and asking if the respondent had heard of or seen it before. Delivering the survey by WebTV also made it possible to measure "unaided" recognition. Unaided recognition was measured by asking this same question, but without showing the label. Both methods are useful measurements of label recognition, although unaided recognition is more conservative.

Recognition results for both this year's and last year's WebTV surveys are summarized in the next table. No statistically measurable changes in aided recognition of the ENERGY STAR label were found between 2002 and 2001. However, unaided recognition is higher this year than last year at a 5 percent level of significance (p-value=0.050).

**Recognition of the ENERGY STAR Label**
**(Base = All respondents)**

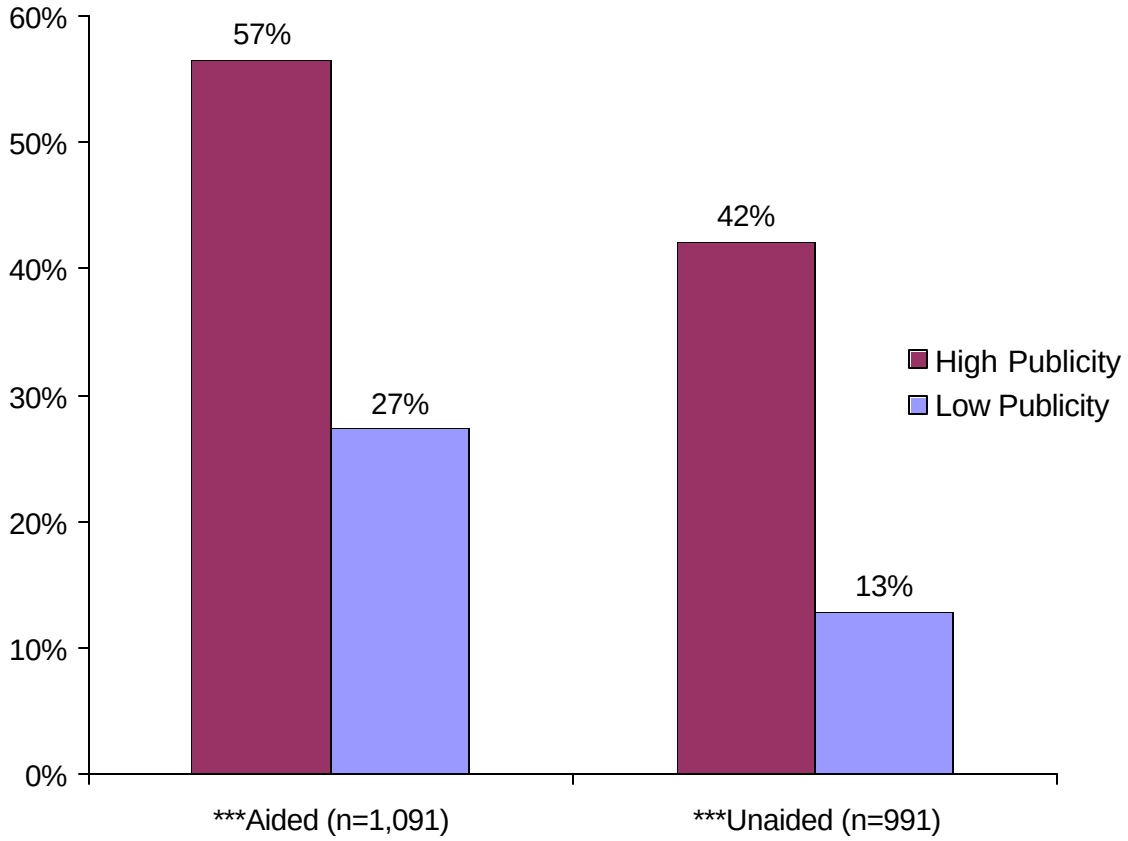
| | WebTV | | | |
|---|---|---|---|---|
| | 2002 | | 2001 | |
| | Aided (n=1,091) | Unaided (n=991) | Aided (n=1,810) | Unaided (n=1,672) |
| Recognize ENERGY STAR label | 41% | 28% | 38% | 24% |
| Standard error | 2.2% | 2.1% | 1.3% | 1.1% |
| # of households (millions) | 71.22 | 65.82 | 69.77 | 64.23 |

Note: The unaided recognition results are based on the question ES1: "Have you ever seen or heard of the ENERGY STAR label?" The aided recognition results are based on two questions. (1) ES3: "Is this the label you have seen or heard of before?," which is asked if ES1="yes." (2) 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?," which is asked if either ES1="no" or ES3="no."

## Recognition by publicity category

Both aided and unaided recognition were higher in high-publicity areas (areas with an active local ENERGY STAR program sponsored by a utility, state agency, or other organization for two or more continuous years) than in low-publicity areas. Aided, households in high-publicity areas recognized the ENERGY STAR label at 57 percent versus 27 percent in low-publicity areas. Unaided recognition was 42 percent in high-publicity areas compared with 13 percent in low-publicity areas. The differences in recognition, both aided and unaided, between high-publicity and low-publicity areas were highly statistically different from zero (p-value < 0.0001).

**Recognition of the ENERGY STAR Label by Publicity Category**
**(Base = All respondents)**

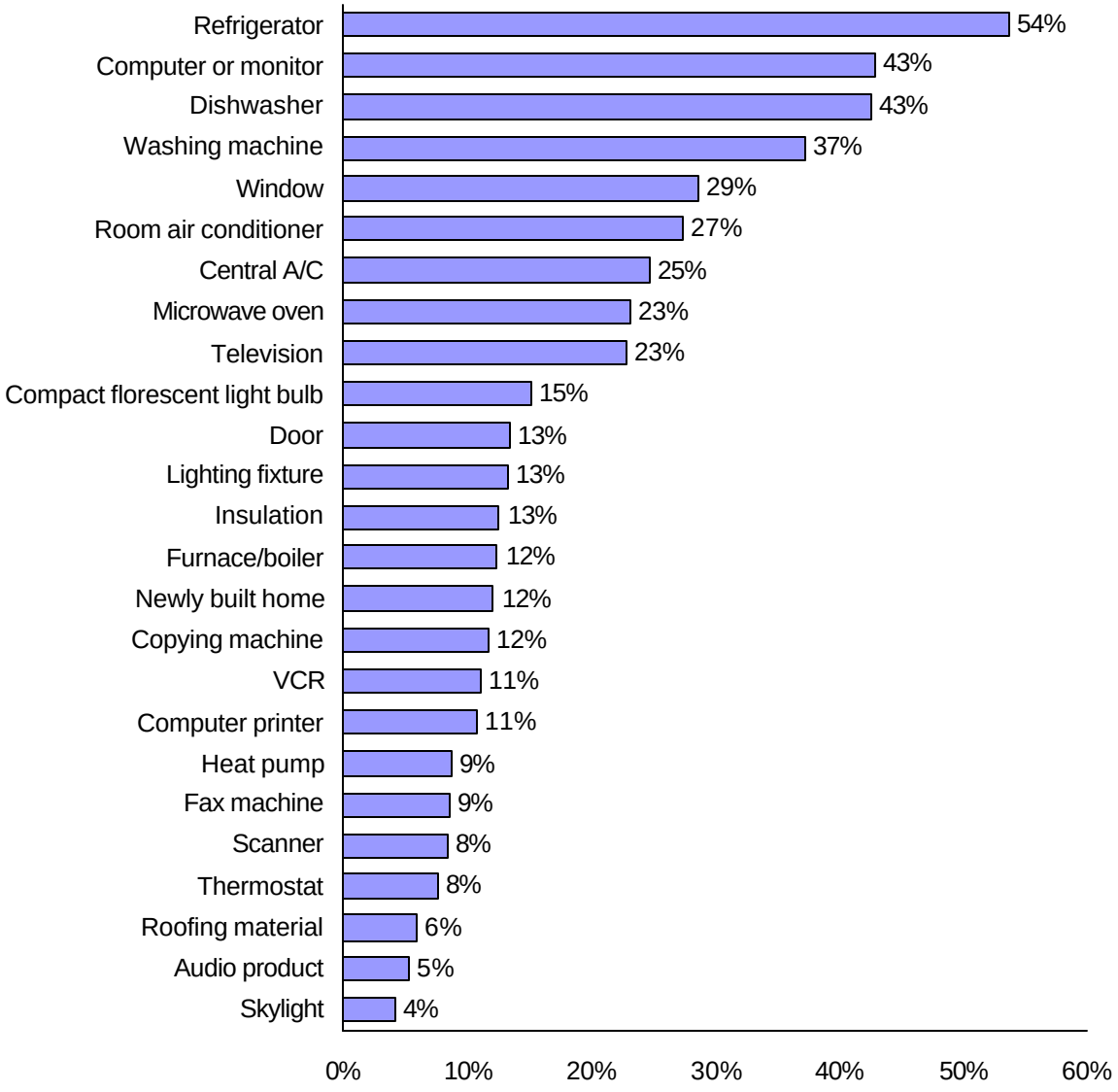



***High- and low-publicity areas proportions are statistically different from each other at the 1 percent level of significance (p-value<=0.01).

**Product associations**

Fifty-four percent of households have seen the ENERGY STAR label on refrigerators. Computers and dishwashers were the next most commonly associated products with the label, both at 43 percent, with washing machines not far behind at 37 percent. Windows, room air conditioners, central air conditioners, and televisions were in the 20 to 30 percent range. Products supported by regional programs, such as refrigerators, dishwashers, washing machines, and air conditioning equipment, show strong association with the ENERGY STAR label. The strong association of the label with computers and televisions is probably the combined effect of manufacturer labeling and the prevalence of these products in daily life. Twenty-three percent of households associate the ENERGY STAR label with microwave ovens, which do not in fact have an ENERGY STAR specification. However, microwave ovens were the least recognized of all the appliances.

**Product Association With the ENERGY STAR Label**
**(Base =Recognize label aided, n=455)**

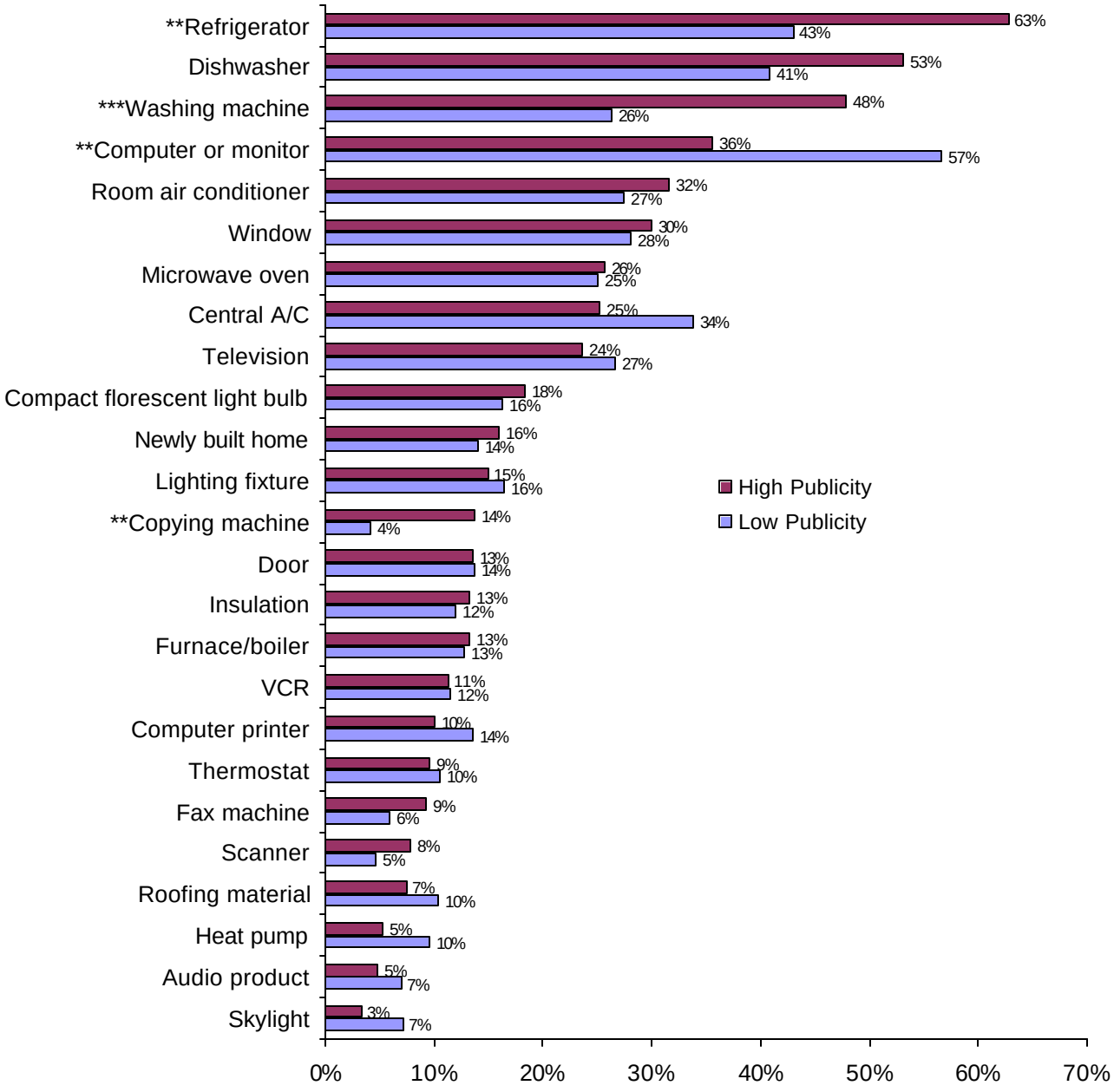



Note: Q5(a, b, and c): "Now we're going to ask you about several groups of products. As you review the list, please select each of the products, product literature, or packaging on which you have seen the ENERGY STAR label.

**Product associations by publicity category**

For most products, the proportion of households that associated the product with the ENERGY STAR label was statistically the same for high- and low-publicity areas. For several products, however, the proportions were statistically different from each other at the 10 percent level of significance or better. A larger proportion of households in high- than in low-publicity areas associated the label with refrigerators, washing machines, and copy machines. On the other hand, a smaller proportion of households in high- than in low-publicity areas associated the ENERGY STAR label with computers. Regional energy efficiency program sponsors promoted refrigerators and washing machines heavily, but they did not promote computers heavily.

**Product Association With the ENERGY STAR Label by Publicity Category**
**(Base =Recognize label aided, n=455)**




***High- and low-publicity areas proportions are statistically different from each other at the 1 percent level of significance (p-value<=0.01).

**High- and low-publicity areas proportions are statistically different from each other at the 5 percent level of significance (p-value<=0.05).

## UNDERSTANDING

In 2002, 58 percent of households have at least a general understanding of the ENERGY STAR label with 46 percent exhibiting a high degree of understanding. Understanding was probed by asking respondents what messages came to mind when they saw the ENERGY STAR label. Responses were categorized, coded appropriately, and further classified as high, general, or no understanding.

The results on understanding of the ENERGY STAR label for both this year's and last year's WebTV surveys are provided in the next table. The proportions of households with at least a general understanding of the ENERGY STAR label were similar between 2002 and 2001, 58 and 56 percent respectively.

**Level of Understanding of the ENERGY STAR Label**
**(Base = All respondents)**

| | WebTV | |
|---|---|---|
| **Level of Understanding of the ENERGY STAR Label** | **2002 (n=1,168)** | **2001 (n=1,936)** |
| High understanding | 46% | 37% |
| General understanding | 12% | 19% |
| No understanding | 42% | 44% |
| **Total** | 100% | 100% |
| **# of households (millions)** | 75.39 | 74.44 |

Note: The level of understanding of the label are based on two questions. (1) If recognized the label unaided, ES2: "What does the ENERGY STAR label mean to you?" (2) If did not recognize the label unaided, ES4A1: "Type the messages that come to mind when you see the ENERGY STAR label?"

## Understanding by publicity category

Understanding of the ENERGY STAR label was greater in high- than in low-publicity areas. Sixty-three percent of households in high-publicity areas had at least a general understanding of the label compared with 54 percent of households in low-publicity areas. These two estimates of at least general understanding of the label were significantly different from each other (p-value=0.096).

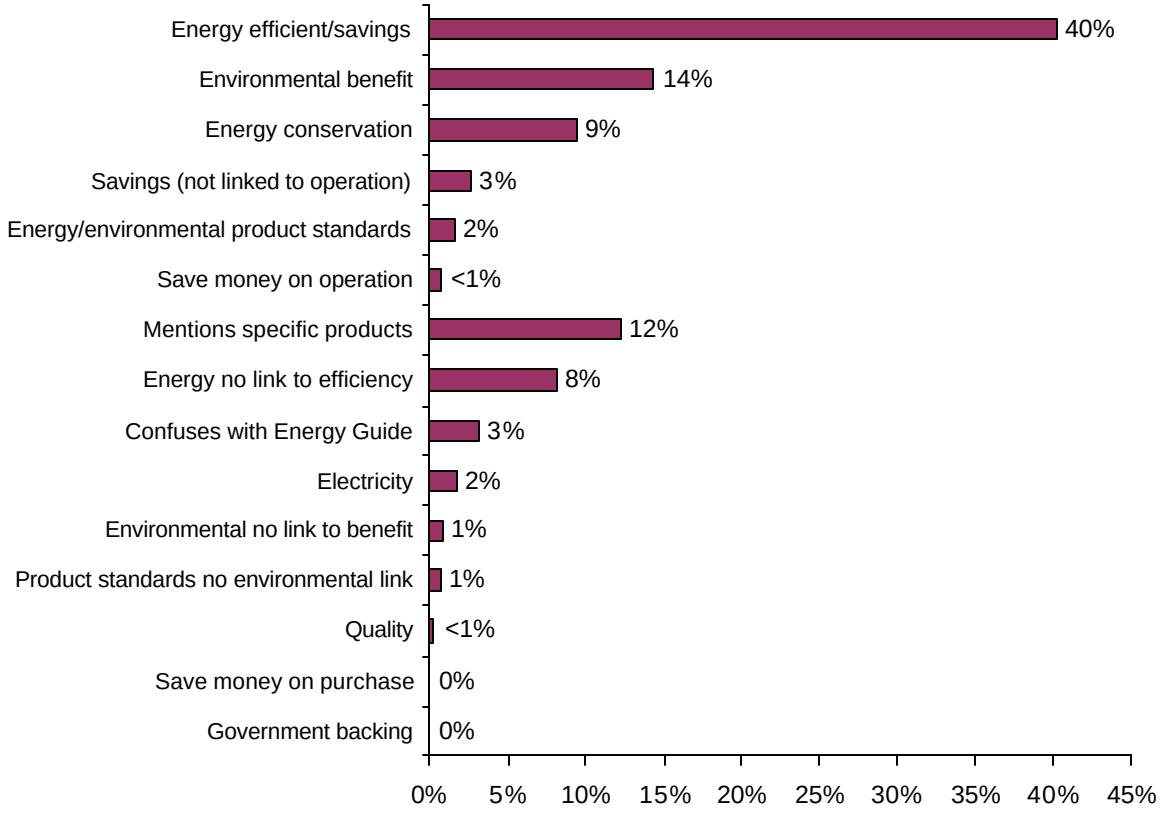
**At Least a General Understanding of the ENERGY STAR Label by Publicity Category (Base = All respondents)**

| Publicity Category | % Households |
|---|---|
| High | 63% |
| Low | 54% |
| **High-Low** | 9% |
| **p-value** | 0.096 |

## Label messaging

Open-ended responses used to measure understanding are also an indicator of how effectively EPA communicates its messages through the ENERGY STAR label. By far the most common message associated with the label is "energy efficiency or energy savings." Forty percent of households associate the ENERGY STAR label with this message. "Environmental benefit" is the second most common message associated with the label, at 14 percent of households. Both of these messages are considered high understanding of the ENERGY STAR label.

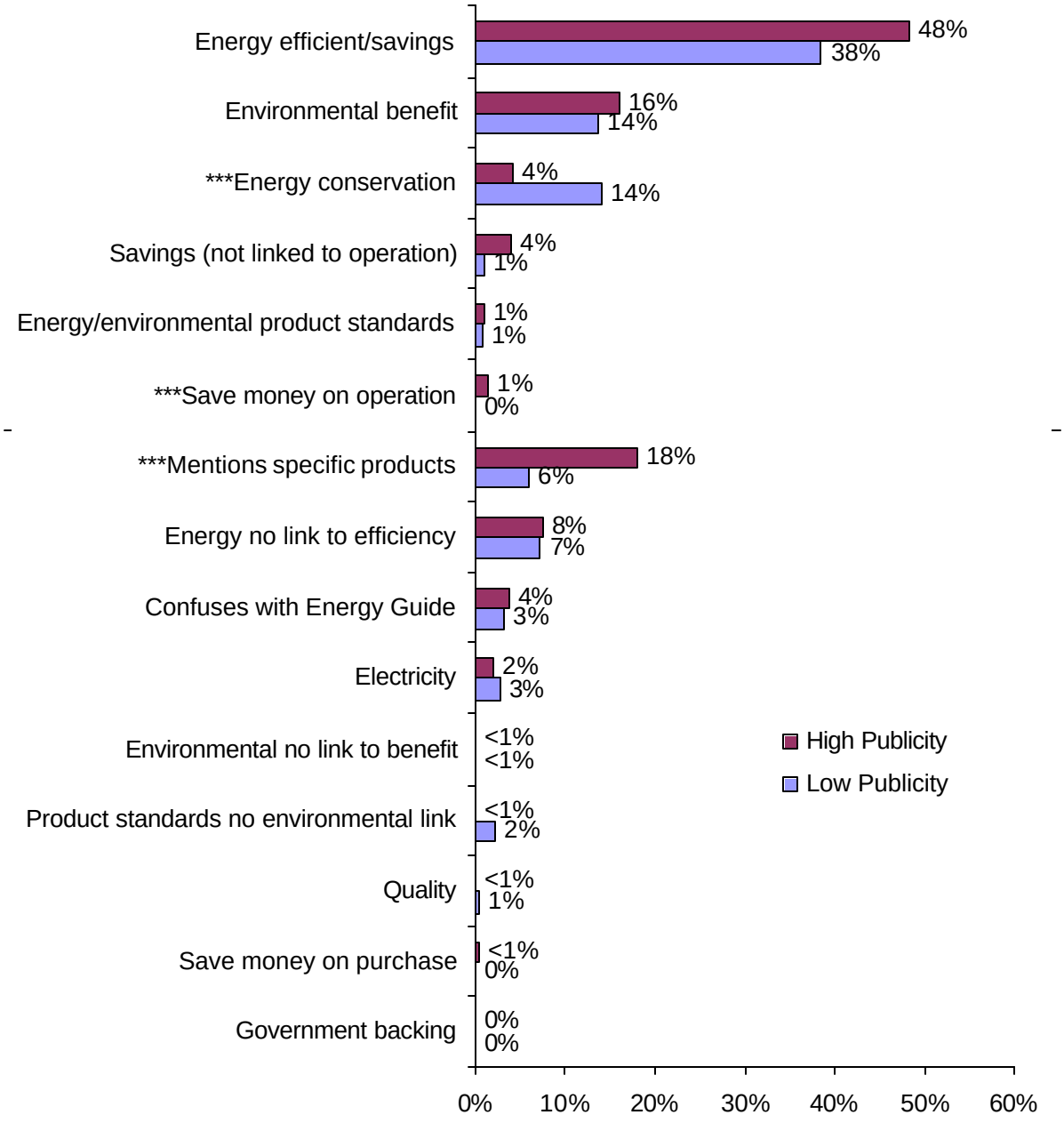
**Messages of the ENERGY STAR Label**
**(Base = All respondents, n=867)**




## Messaging by publicity category

For most messages, the proportion of households that associated the message with the ENERGY STAR label was statistically the same for high- and low-publicity areas. For two messages, however, the proportions were statistically different from each other at the 10 percent level of significance or better. A larger proportion of households in high-publicity areas associated the label with "a specific product" (p-value=0.001). Perhaps this is because regional energy efficiency program sponsors promoted certain products heavily. On the other hand, a larger proportion of households in low-publicity areas associated the ENERGY STAR label with " energy conservation" (p-value=0.010).

**Messages of the ENERGY STAR Label by Publicity Category**
**(Base = All respondents, n=1375)**




***High- and low-publicity areas proportions are statistically different from each other at the 1 percent level of significance (p-value<=0.01).

### Understanding by aided recognition

Households that recognize the ENERGY STAR label with a visual aid are more likely to have at least a general understanding of the label than those who do not recognize the label. Among households that recognize the label, 75 percent have at least a general understanding of the label, compared with households that do not recognize the label at 47 percent. The 28 percentage point difference between these two proportions was highly statistically different (p-value < 0.0001).

**At Least a General Understanding of the ENERGY STAR Label by Aided Recognition of the Label (Base = All respondents, n=1,091)**

| Recognize ENERGY STAR Label Aided | % Households at Least General Understanding |
|---|---|
| Yes | 75% |
| No | 47% |
| **Yes-No** | 28% |
| **p-value** | <0.0001 |

## INFLUENCE

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

- The influence of the label on purchasing decisions;
- The role of rebates or financing in decisions to buy ENERGY STAR products;
- The proportion of households, nationally, that recognize the ENERGY STAR label and actually purchased a labeled product; and
- The loyalty of ENERGY STAR purchasers.

## Influence of the ENERGY STAR label

In 2002, for 21 percent of households that purchased an ENERGY STAR-labeled product, the presence of the label influenced their purchasing decision "very much." For 67 percent of households, the presence of the label influenced their purchasing decision to some extent ("very much," "somewhat," or "slightly").

The results on influence of the ENERGY STAR label for this year's and last year's WebTV surveys are provided in the following table. The proportions of households for which the ENERGY STAR label was at least somewhat influential in their purchasing decision were similar between 2002 and 2001, 46 and 49 percent respectively.

**Influence of the ENERGY STAR Label on Purchasing Decisions**
**(Base = Recognize label aided and ENERGY STAR purchasers)**

| | WebTV | |
|---|---|---|
| **Response** | **2002 (n=141)** | **2001 (n=247)** |
| Very much | 21% | 23% |
| Somewhat | 25% | 25% |
| Slightly | 21% | 14% |
| Not at all | 33% | 38% |
| **Total** | 100% | 100% |
| **# of households (millions)** | 7.76 | 8.15 |

Note: Q8: "For any ENERGY STAR labeled product(s) you purchased, how much did the presence or absence of the ENERGY STAR label influence your purchasing decision?"

## Influence of the ENERGY STAR label by publicity category

The purchasing decisions of 57 percent of households in high-publicity areas were at least somewhat influenced by the ENERGY STAR label, compared to 32 percent of households in low-publicity areas. The difference between these two proportions was significantly different from zero at the 10 percent level (p-value=0.082).

**Influence of the ENERGY STAR Label on Purchasing Decisions by Publicity Category**
**(Base = Recognize label aided and ENERGY STAR purchasers, n=141)**

| Publicity Category | Very much | Very much or somewhat | Very much, somewhat, or slightly |
|---|---|---|---|
| High | 32% | 57% | 74% |
| Low | 19% | 32% | 52% |
| **High-Low** | 13% | 25% | 22% |
| **p-value** | 0.312 | 0.082 | 0.189 |

## Rebate and financing influence

Thirteen percent of households that purchased an ENERGY STAR-labeled product received rebates or reduced-rate financing. A very large proportion of these households, 92 percent, would have been "very likely" or "somewhat likely" to purchase the labeled product if financial incentives had not been available.

**Influence of Rebates and Financing on Purchasing Decisions**
**(Base = Recognize label aided, ENERGY STAR purchaser, and received an incentive, n=30)**

| Likelihood Purchase ENERGY STAR Product Without Financial Incentive | % Households |
|---|---|
| Very likely | 40% |
| Somewhat likely | 52% |
| Slightly likely | 2% |
| Not at all likely | 6% |
| **Total** | 100% |
| **# of households (millions)** | 0.98 |

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?"

## Purchases of ENERGY STAR

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

- the proportion of all households that recognized (aided) the ENERGY STAR label,
- of the households that recognized the label, the proportion that purchased a product, and
- of the households that recognized the label and purchased a product, the proportion that purchased an ENERGY STAR product.

With the result that 17 percent of all households knowingly purchased at least one qualifying ENERGY STAR product in the last twelve months.

Considering only households that recognized the label (rather than all households), in 2002, 60 percent of these households purchased at least one qualifying ENERGY STAR product in the last twelve months. This is similar to last year's WebTV result, 66 percent.

**Purchased ENERGY STAR**
**(Base = Recognize label aided and purchaser)**

| | WebTV | |
|---|---|---|
| | **2002 (n=228)** | **2001 (n=373)** |
| Purchased ENERGY STAR Product | 60% | 66% |
| **# of households (millions)** | 13.65 | 12.62 |

Note: Q7: "For any of the products you purchased, did you see the ENERGY STAR label (on the product itself, on the packaging, or on the instructions)?"

## Purchases of ENERGY STAR by publicity category

A higher proportion of all households knowingly purchased an ENERGY STAR product in high-publicity areas than in low-publicity areas. Twenty-five percent of all households in high-publicity areas knowingly purchased an ENERGY STAR product compared with 11 percent of all households in low-publicity areas. These two proportions were highly statistically different from each other (p-value=0.007).

**National Household Market Penetration of ENERGY STAR Products by Publicity Category**
**(Base = All respondents)**

| Publicity Category | % Households |
|---|---|
| High | 25% |
| Low | 11% |
| **High-Low** | 13% |
| **p-value** | 0.007 |

## Loyalty to ENERGY STAR

In 2002, 63 percent of households that purchased an ENERGY STAR-labeled product would be "very likely" or "somewhat likely" to recommend labeled products to a friend. Furthermore, only 14 percent of households would be "not at all likely" to recommend ENERGY STAR products to a friend.

The results on loyalty to the ENERGY STAR label for both this year's and last year's WebTV surveys are shown in the next table. The proportions of households at least somewhat likely to recommend labeled products to a friend were similar between 2002 and 2001, 63 and 65 percent respectively.

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

| | WebTV | |
|---|---|---|
| **Likelihood Recommend ENERGY STAR Products** | **2002 (n=121)** | **2001 (n=212)** |
| Very likely | 39% | 33% |
| Somewhat likely | 24% | 32% |
| Slightly likely | 23% | 18% |
| Not at all likely | 14% | 16% |
| **Total** | 100% | 100% |
| **# of households (millions)** | 6.27 | 7.08 |

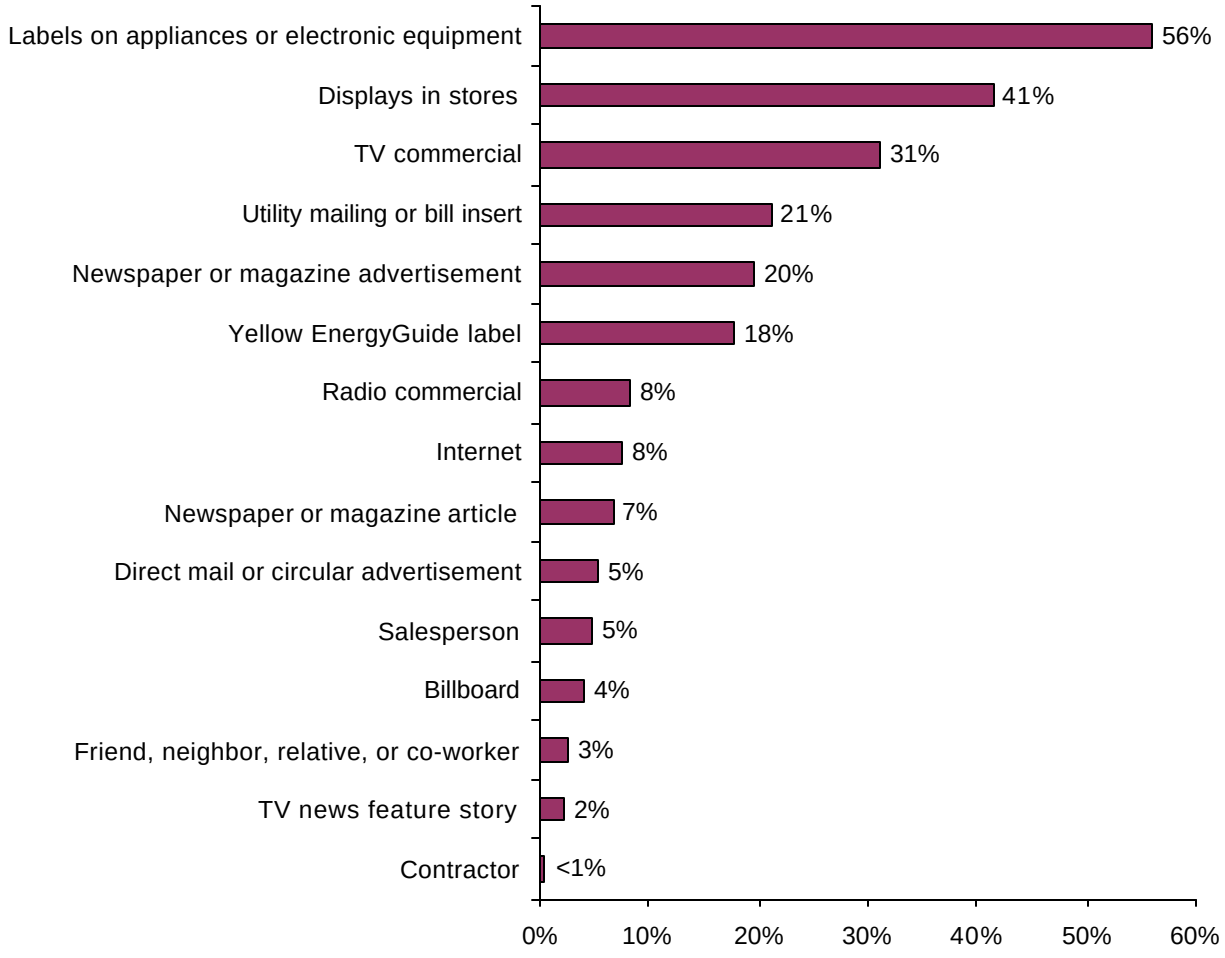
Note: Q11: "How likely are you to recommend ENERGY STAR-labeled products to a friend?"

## INFORMATION SOURCES

### Sources seen

Fifty-six percent of households have seen something about ENERGY STAR on appliance or electronic equipment labels, followed by store displays at 41 percent. Next, 31 percent of households have heard or seen something about ENERGY STAR on TV commercials. After these three sources, about 20 percent of households have seen something about ENERGY STAR on utility mailings or bill inserts; newspaper or magazine advertisements; or EnergyGuide labels.

**Sources Saw or Heard Something About ENERGY STAR**
**(Base = Recognize label aided, n=421)**

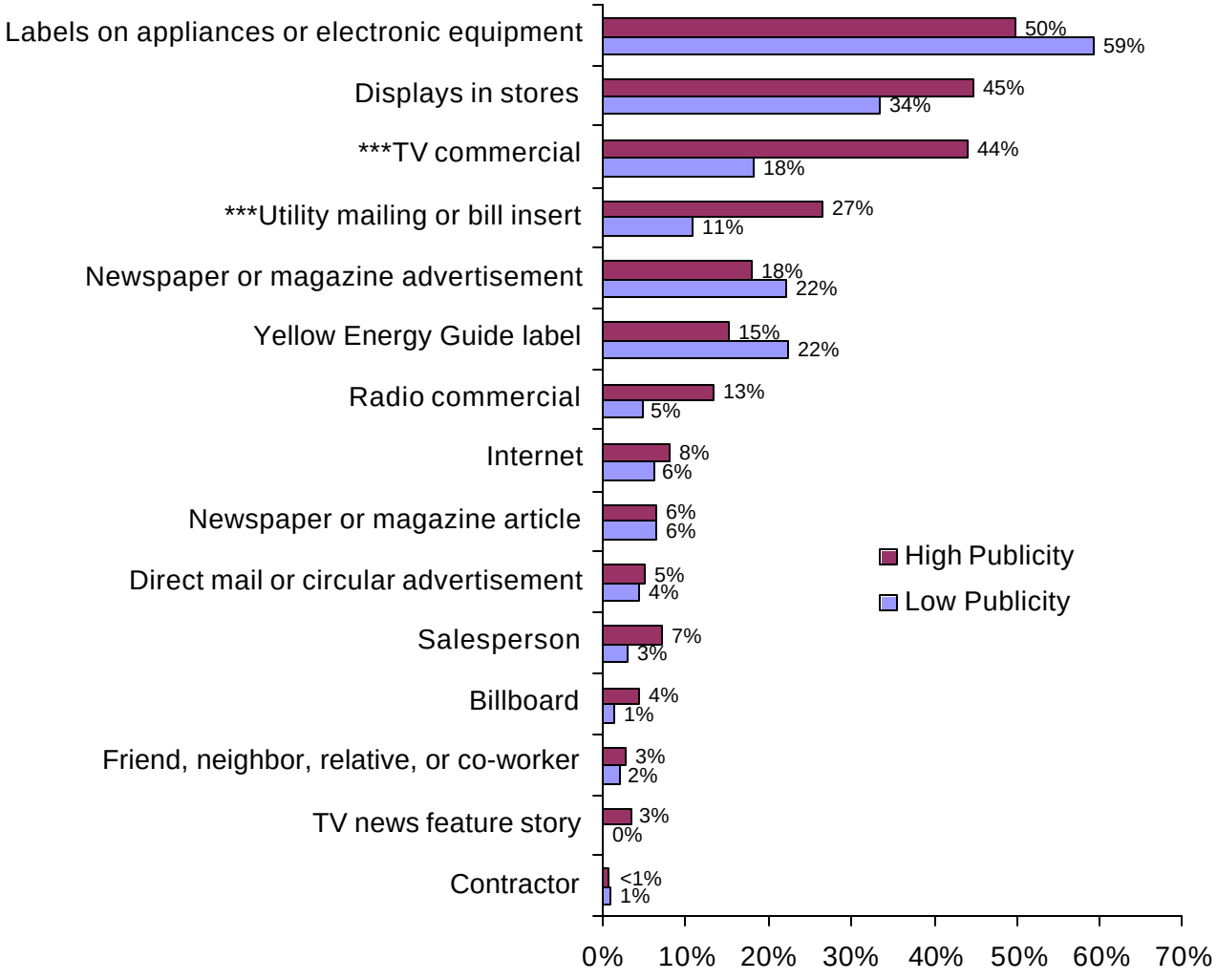



Note: SO1: "Where did you see or hear something about ENERGY STAR? Please mark all that apply."

**Sources seen by publicity category**

For most sources, the proportion of households that have heard or seen something about ENERGY STAR was statistically the same for high- and low-publicity areas. For a couple of sources, however, the proportions were statistically different from each other at the 10 percent level of significance or better. A much larger proportion of households in high- than in low-publicity areas have heard or seen something about ENERGY STAR on both TV commercials and utility mailings or bill inserts (p-value<0.01).

**Sources Saw or Heard Something About ENERGY STAR by Publicity Level**
**(Base = Recognize label aided, n=421)**

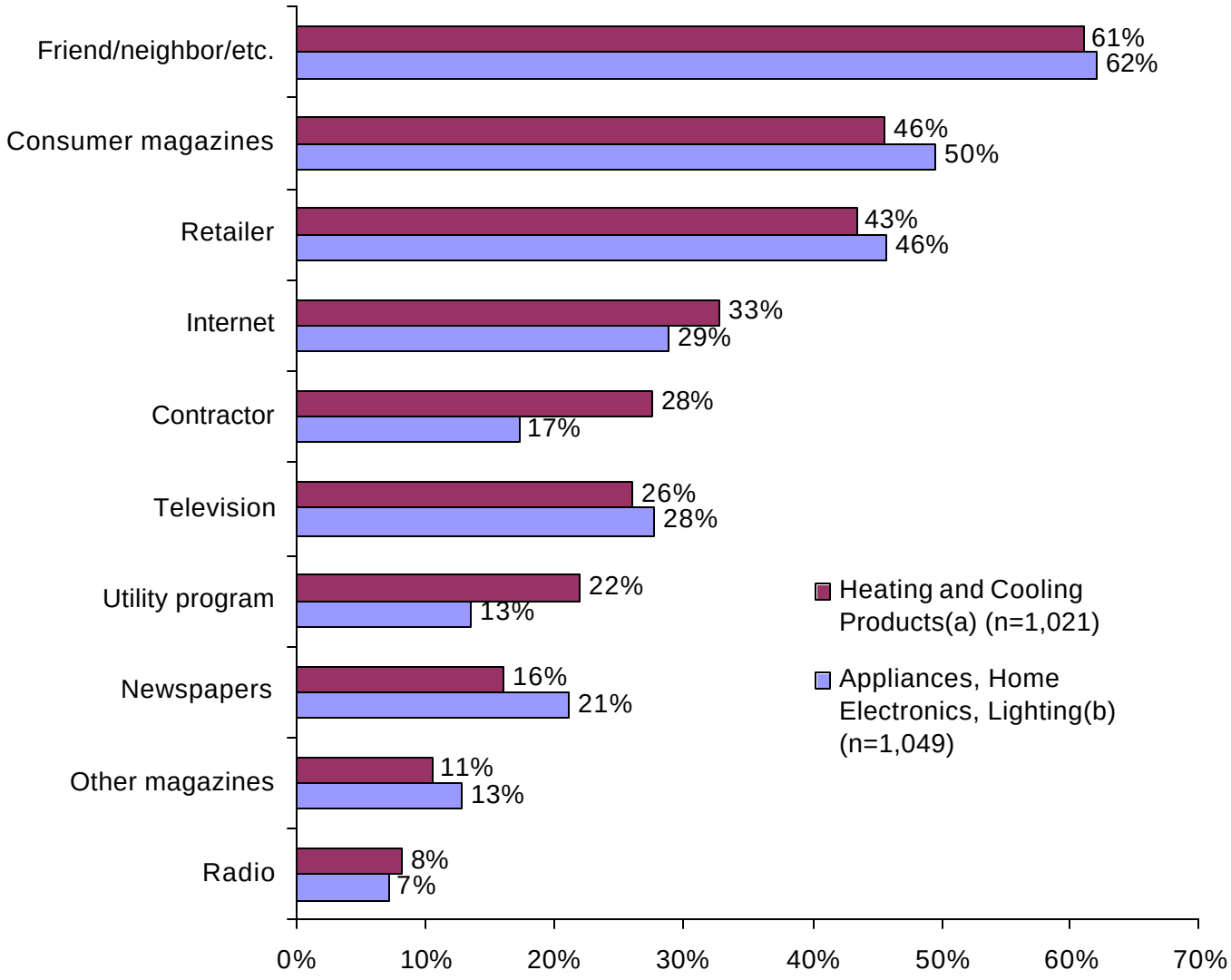



***High- and low-publicity areas' proportions are statistically different from each other at the 1 percent level of significance (p-value<=0.01).

**Sources consumers consult for product information**

The survey asked about the sources consumers are most likely to use to obtain information about products covered by the ENERGY STAR program. The question was asked separately for two product groups: (1) heating and cooling products and (2) home appliances, lighting, and home electronics. For both product groups, the top four sources were the same: personal acquaintances, consumer magazines, retailers, and the internet. Also, the proportion of households consulting each of these sources were similar for both product groups: personal acquaintances at about 60 percent, consumer magazines and retailers between 43 and 50 percent, and the internet at about 30 percent. For both product groups, television was also in the neighborhood of 30 percent and for heating and cooling products so were contractors. The proportion of households consulting the remaining sources for product information were 20 percent or less.

**Product Information Sources Consulted**
**(Base = All respondents)**




(a)Q13_1: "Now, please think only about Heating and Cooling Products. Please select the source(s) of information you are most likely to use to obtain information about this product type. Please mark all that apply."
(b)Q13_2: "Now, please think only about Home Appliances/Lighting/Home Electronics. Please select the source(s) of information you are most likely to use to obtain information about this product type. Please mark all that apply."

Considering only households that recognized the ENERGY STAR label, there are some noteworthy differences between the sources they consult for product information and where they saw or heard something about ENERGY STAR. In particular, the proportion of these households that consult personal acquaintances, salespersons or contractors, the internet, or consumer-related magazines for product information, appear to be much larger than the proportion of these households that saw or heard something about ENERGY STAR via these same sources. For these sources, the difference between the proportion of households that consult the source for product information and the proportion of households that saw or heard something about ENERGY STAR via the source ranges between about 15 and 55 percent.

**ENERGY STAR Sources Compared With Sources Consulted**
**(Base = Recognized Aided)**

| Source | ENERGY STAR Sources (n=421) | Sources Consulted | | | |
|---|---|---|---|---|---|
| | | Heating and Cooling Products (n=430) | | Home Appliances/Lighting/ Home Electronics (n=449) | |
| Newspaper or magazine advertisement | 20% | Consumer Reports, other product-oriented magazines | 53% | Consumer Reports, other product-oriented magazines | 53% |
| Newspaper or magazine article | 7% | Newspaper | 15% | Newspaper | 16% |
| | | Other magazines | 10% | Other magazines | 14% |
| TV commercial | 31% | | 21% | | 21% |
| TV news feature story | 2% | | | | |
| Radio commercial | 8% | | 7% | | 8% |
| Utility mailing or bill insert | 21% | | 29% | | 17% |
| Internet | 8% | | 43% | | 38% |
| Salesperson | 5% | | 45% | | 48% |
| Contractor | <1% | | 32% | | 17% |
| Friend, neighbor, relative, or co-worker | 3% | | 58% | | 65% |

# APPENDIX A

# DETAILED METHODOLOGY

From August through September 2002, the Consortium for Energy Efficiency (CEE) designed and fielded a household survey to obtain information at the national level on consumer awareness of the ENERGY STAR label. The survey was delivered by WebTV and was similar to last year's WebTV survey. As in the previous two years, CEE and participating members made the survey data publicly available.

This report discusses the results of the CEE 2002 ENERGY STAR Household Survey, building on prior years' survey information and focusing on the extent to which consumers recognized the ENERGY STAR label, understood its intended messages, and used (or were influenced by) the label on 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 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 9 through October 7, 2002.

The remainder of Appendix A discusses the questionnaire design, sampling and weighting methodologies, and data collection.

## 1 Questionnaire design

In 2002, CEE conducted the ENERGY STAR survey using a questionnaire designed to be delivered by WebTV. The 2002 WebTV questionnaire was used in a survey conducted via an interactive WebTV device in the homes of people who had been randomly recruited and preselected to be representative of the population.

The data from this survey may be compared with data collected using the 2001 WebTV questionnaire, for which CEE was also responsible. Sampling for the survey is discussed in Section 2 and data collection is discussed in Section 3.

The committee had several broad objectives in designing the 2002 questionnaires, including:

- To maintain consistency with the CEE 2000 and 2001 mail survey and the 2001 WebTV survey[2].
- To fine-tune the questionnaire based on lessons learned from the analysis of the CEE 2000 survey, focusing on achieving the greatest value from the analysis of the CEE 2001 survey.

The 2002 WebTV questionnaire addressed the following:

- Respondent recognition of the ENERGY STAR label
- Understanding of, and key messages communicated by, the ENERGY STAR label
- Sources of information about ENERGY STAR
- Products on which respondents have seen the label
- Products that respondents have purchased in the past year
- Products that respondents have purchased on which they have seen the label (or on whose packaging or instructions they have seen the label)
- Influence of the presence or absence of the label on the purchase decision
- 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
- Likely sources of information about product categories
- Demographic questions (most of the demographic questions were not asked in the WebTV survey, because demographic characteristics of the respondents were already on file.)
- Likelihood to recommend ENERGY STAR labeled products to a friend
- Recognition and understanding of the yellow *EnergyGuide* labels

The 2002 WebTV questionnaire is very similar to the 2001 WebTV questionnaire. The only difference is the addition of two questions.

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[2] The CEE committee plans to continue fielding the WebTV survey in the future in lieu of the mail survey.

- oq20. How many bedrooms do you have in your home?

- q6a. Have you or someone else in your household been shopping in a store in the last 12 months for any of the products listed below?
  - Heating and Cooling Products
    - Central air conditioner
    - Furnace or boiler
    - Heat pump
    - Thermostat
    - Room air conditioner
  - Home Office Equipment
    - Computer or monitor
    - Computer printer
    - Copying machine
    - Fax machine
    - Scanner
    - None of these products
  - Home Appliances/Lighting
    - Dishwasher
    - Refrigerator
    - Lighting fixture
    - Washing machine
    - Compact fluorescent light bulb
    - Microwave oven
  - Home Electronics
    - Television
    - VCR
    - Audio product
    - None of these products
  - Building Materials
    - Window
    - Door
    - Skylight
    - Insulation
    - Roofing material

- q6b. Have you or someone else in your household been shopping for a newly built home in the last 12 months?

The interactive format of a WebTV 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. For example, while the 2000 and 2001 mail questionnaires begin by showing the ENERGY STAR label and asking about understanding and whether they recognize it before asking other questions, respondents can still potentially educate themselves in a limited way about the ENERGY STAR label by reading the survey before completing it, affecting their responses. The 2001 and 2002 WebTV questionnaires (after questions about the yellow *EnergyGuide* label), however, ask respondents—without showing the 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 WebTV questionnaire then shows the ENERGY STAR label (which is obviously not possible with the telephone questionnaire) and asks about understanding and recognition. Responses to this question should thus be comparable to those obtained through the 2001 mail survey. Other differences between the mail questionnaires and the WebTV questionnaire are that the latter—much like a telephone questionnaire using computer-assisted telephone interviewing (CATI)—can program lines of questions based on responses to earlier questions. For example, WebTV respondents who say they have 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.

# 2 Sampling

## 2.1 Designated Marketing Areas Publicity Categories

The same publicity classification procedure used last year was used this year. In both 2001 and 2002, a Nielsen Designated Marketing Area ®(DMA) was classified as high publicity, low publicity, or other using the following criteria:

- **High publicity:** At least two *recent* years of *sustained* promotions and publicity from non-federal activities

- **Low publicity:** Federal campaign activities only and no *significant* regional program sponsor activities

- **Other:** All other DMAs

This classification procedure identifies three publicity categories and provides clear and verifiable definitions. The key working definitions are:

- **Recent***:* The two years of activity must include the time of the survey fielding
- **Sustained***:* The two years of activity must be continuous
- **Significant***:* In addition to any direct federal publicity efforts[3], publicity efforts must include a deliberate and multifaceted regional program sponsor investment in ENERGY STAR programming, such as direct marketing and promotional efforts

These definitions are sufficiently operational to be applicable to future survey efforts, and can be modified by simply increasing the duration of sustained high publicity. The publicity-level assignments are detailed in the table below, followed by a table of supplemental CEE member sponsor areas.

**Top 57 Designated Market Areas (Excluding Sponsor Area)**

| Rank | Designated Market Area (DMA) | # TV Households 2002-2003 NOT in Sponsor Area | % of US TV Households | Publicity Category |
|---|---|---|---|---|
| 1 | New York | 7,282,320 | 6.8% | High |
| 2 | Los Angeles | 5,318,040 | 5.0% | High |
| 3 | Chicago | 3,351,330 | 3.1% | Other |
| 4 | Philadelphia | 2,830,470 | 2.7% | Other |
| 5 | San Francisco-Oak-San Jose | 2,436,220 | 2.3% | High |
| 6 | Boston (Manchester) | 411,207 | 2.2% | High |
| 7 | Dallas-Ft. Worth | 2,195,540 | 2.1% | Other |
| 8 | Washington, DC (Hagerstown) | 2,169,230 | 2.0% | Other |
| 9 | Atlanta | 1,971,180 | 1.8% | Low |
| 10 | Detroit | 1,899,910 | 1.8% | Other |
| 11 | Houston | 1,814,140 | 1.7% | Other |
| 12 | Seattle-Tacoma | 1,659,100 | 1.6% | High |
| 13 | Tampa-St. Pete (Sarasota) | 1,620,110 | 1.5% | Low |
| 14 | Minneapolis-St. Paul | 1,594,740 | 1.5% | Other |
| 15 | Cleveland-Akron (Canton) | 1,528,840 | 1.4% | Other |
| 16 | Phoenix | 1,524,130 | 1.4% | Other |
| 17 | Miami-Ft. Lauderdale | 1,486,860 | 1.4% | Other |
| 18 | Denver | 1,366,250 | 1.3% | Other |
| 19 | Sacramnto-Stktn-Modesto | 1,227,600 | 1.2% | High |
| 20 | Orlando-Daytona Bch-Melbrn | 1,224,470 | 1.1% | Low |
| 21 | Pittsburgh | 1,165,660 | 1.1% | Other |
| 22 | St. Louis | 1,156,370 | 1.1% | Other |

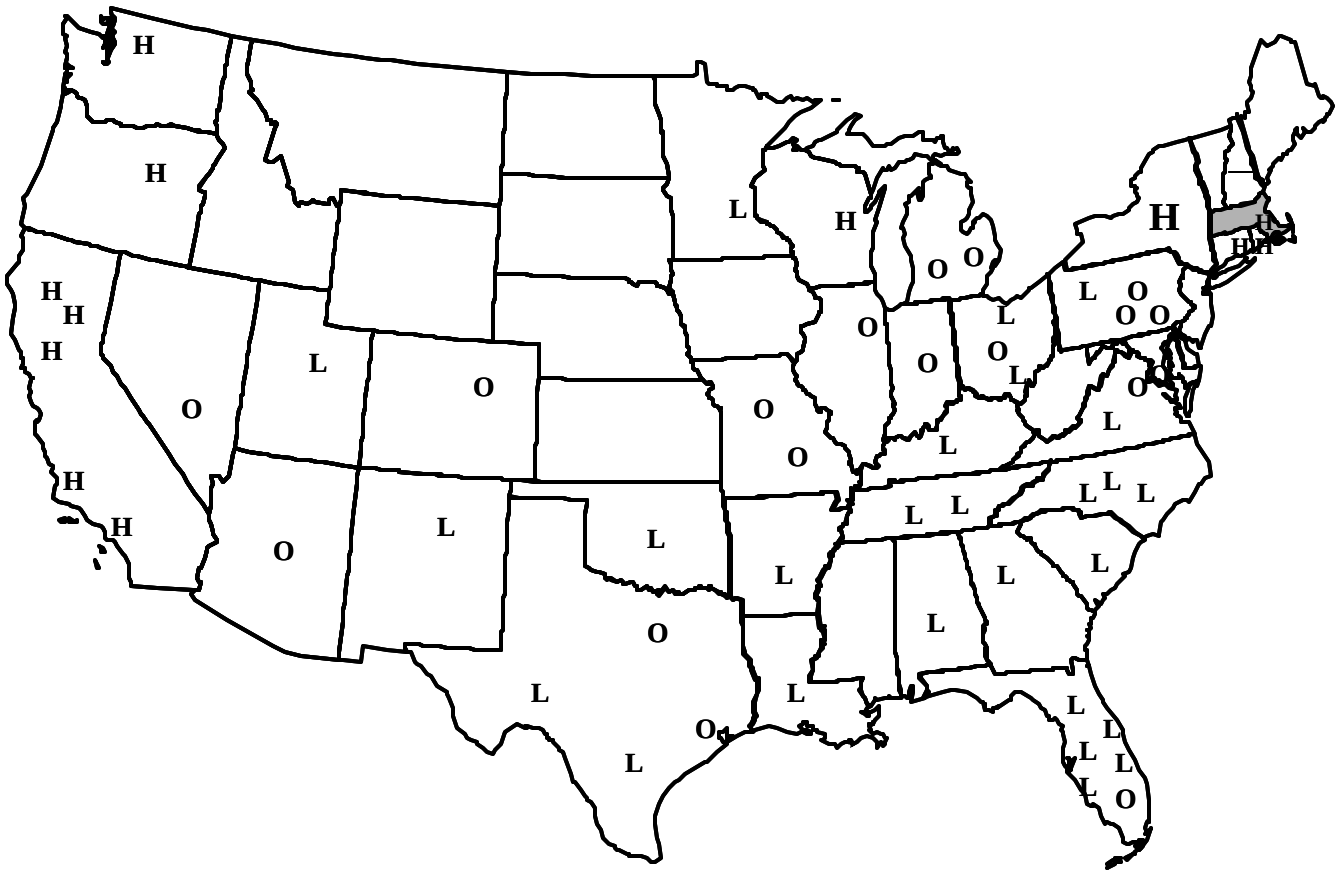
[3] During the September 2001 to September 2002 period, EPA launched the first of three new television national Public Service Announcements (PSAs) as part of its *Change* campaign. The *Change* campaign also included continued distribution of several radio and print PSAs as a component of its overall outreach strategy.

| Rank | Designated Market Area (DMA) | # TV Households 2002-2003 NOT in Sponsor Area | % of US TV Households | Publicity Category |
|---|---|---|---|---|
| 23 | Portland, OR | 1,061,080 | 1.0% | High |
| 24 | Baltimore | 1,060,450 | 1.0% | Other |
| 25 | Indianapolis | 1,019,870 | 1.0% | Other |
| 26 | San Diego | 1,004,220 | 0.9% | High |
| 27 | Hartford & New Haven | 980,410 | 0.9% | High |
| 28 | Charlotte | 962,540 | 0.9% | Low |
| 29 | Raleigh-Durham (Fayetvlle) | 929,460 | 0.9% | Low |
| 30 | Nashville | 880,670 | 0.8% | Low |
| 31 | Milwaukee | 860,350 | 0.8% | High |
| 32 | Cincinnati | 854,250 | 0.8% | Low |
| 33 | Kansas City | 852,510 | 0.8% | Other |
| 34 | Columbus, OH | 835,780 | 0.8% | Other |
| 35 | Greenvll-Spart-Ashevll-And | 792,110 | 0.7% | Low |
| 36 | Salt Lake City | 769,230 | 0.7% | Other |
| 37 | San Antonio | 718,730 | 0.7% | Low |
| 38 | Grand Rapids-Kalmzoo-B.Crk | 713,800 | 0.7% | Other |
| 39 | West Palm Beach-Ft. Pierce | 700,850 | 0.7% | Low |
| 40 | Birmingham (Ann and Tusc) | 690,030 | 0.6% | Low |
| 41 | Norfolk-Portsmth-Newpt Nws | 677,610 | 0.6% | Low |
| 42 | New Orleans | 658,830 | 0.6% | Low |
| 43 | Memphis | 653,840 | 0.6% | Low |
| 44 | Buffalo | 639,190 | 0.6% | High |
| 45 | Oklahoma City | 636,970 | 0.6% | Low |
| 46 | Greensboro-H.Point-W.Salem | 634,140 | 0.6% | Low |
| 47 | Harrisburg-Lncstr-Leb-York | 626,660 | 0.6% | Other |
| 48 | Providence-New Bedford | 411,482 | 0.6% | High |
| 49 | Albuquerque-Santa Fe | 620,230 | 0.6% | Low |
| 50 | Louisville | 612,300 | 0.6% | Other |
| 51 | Jacksonville, Brunswick | 587,200 | 0.6% | Low |
| 52 | Las Vegas | 585,440 | 0.5% | Other |
| 53 | Wilkes Barre-Scranton | 580,290 | 0.5% | Low |
| 54 | Austin | 552,060 | 0.5% | Other |
| 55 | Albany-Schenectady-Troy | 477,032 | 0.5% | High |
| 56 | Little Rock-Pine Bluff | 523,810 | 0.5% | Low |
| 57 | Fresno-Visalia | 519,330 | 0.5% | High |
| **Total** | | **72,916,471** | **70.4%** | |

## Sponsor Area

| Sponsor Area | Publicity Category | Comments |
|---|---|---|
| Massachusetts | High | Includes parts of Albany-Schnectady-Troy DMA (Rank 55): Berkshire County; Boston DMA (Rank 6): Barnstable, Dukes; Essex, Middlesex, Nantucket, Norfolk, Plymouth, Suffolk, and Worcestor Counties; Providence-New Bedford (Rank 48): Bristol County |

# Map of Top 57 Designated Market Areas (DMAs) by Publicity Category[4]




[4] Neither Alaska or Hawaii contained DMAs ranking 57 or below.

## 2.2 Sample Design

The sample is a national sample. The sampling frame is all households in the largest DMAs that account for approximately 70 percent of U.S. television households. In 2002, the 57 largest DMAs account for approximately 70 percent of U.S. television households. In addition, one CEE member sponsored more intensive sampling (an oversample) for their state. This state is referred to as a "sponsor area." For the sponsor area, the frame was not limited to the large DMAs, but included the entire state. Thus, the complete frame for the study was the combination of the largest DMAs and any portion of the sponsor areas that fell outside these DMAs.

The sample is stratified by publicity category and sponsor area. The three publicity categories and one sponsor area result in four strata. Households in the largest and parts of the largest DMAs that are not in the sponsor area were assigned to one of the publicity category strata. Households in the sponsor area were assigned to the sponsor area stratum.

Each publicity category was allocated approximately 266 sampling points. The CEE member who funded the oversample for their sponsor area determined the number of sampling points allocated to their stratum. A larger sample was selected to receive the survey to allow for nonresponse.

## 2.3 Weighting Procedures

The weights employed in the analysis are the weights developed by Knowledge Networks, the company that provides the WebTV survey service, multiplied by the standard sampling weights. Within each stratum, Knowledge Networks calculates weights to account for differences in the WebTV panel from the study population and survey nonresponse. That is, the WebTV weights incorporate post-stratification to account for underlying differences between the recruited panel and the study population, as well as differences in response rates for this particular survey. Both of these adjustments are based on geographic and demographic characteristics known for both the population and the panel. These weights are designed to scale up the under-represented groups and scale down the over-represented groups.

The weights provided by Knowledge Networks correct for disproportionate representation within a stratum, but do not correct for having higher (lower) overall sampling rates in one stratum than in another. Therefore, an additional weighting factor is needed to correct for the relative proportions of the sampling strata. The additional weighting factor is the ratio of population size to sample size in a stratum, that is, the standard sampling weight.

# 3 Data Collection

## 3.1 Survey Implementation

The survey was deployed on September 9 and closed on October 7, 2002.

## 3.2 Response Rates

For WebTV, the *return rate* is the ratio of the number completed to the number of panel members who were asked to complete the survey. While this number is quite high, it must be adjusted by the *recruitment rate*, that is, the number of households that agreed to participate in the WebTV panel, as a proportion of the number of households asked to participate. Thus, the WebTV response rate is the product of the return rate and the recruitment rate. This product is equivalent to the ratio of the number of surveys completed to the number of households that were offered the opportunity to be in the study. The WebTV response rate was 42 percent (based on the same recruitment rate as last year, 56 percent). This level of response is usual for a WebTV survey.

**Survey Response Rate**

| | # Households |
|---|---|
| Sendout/Requested | 1,541 |
| Completed | 1,168 |
| Return Rate (Total) | 76% |
| Recruitment Rate | 56% |
| Response Rate | 42% |

# APPENDIX B

## DEMOGRAPHICS

The analysis presented in this appendix suggests the weighted survey results are a reasonable representation of the study population, which are 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. However, in any survey effort, the persons who respond to the survey tend to be different from those who do not respond. While Knowledge Networks, the company that maintains the WebTV panel, strives to create a representative panel for its WebTV frame, the respondent base will contain subjects and their associated biases that are receptive to the WebTV incentive for service trade off.

The weights employed in the analysis attempt to account for survey nonresponse and differences in the WebTV panel from the study population. To the extent this effort is successful, the distribution of various demographic characteristics based on the weighted survey data will be similar to the distribution based on national Census data. For most demographic characteristics, the two distributions are similar. This suggests the weighted survey results are a reasonable representation of the study population. A summary of the demographic characteristics compared is provided in the table below and the detailed comparisons are provided in the tables at the end of this appendix.

**Summary of Distribution Comparisons**

| Demographic Characteristic | Largest Difference (Absolute Value): Survey Estimate Less Census % | |
|---|---|---|
| Householder/respondent age | 75 or older | -6.4% |
| Household annual income | $25,000-$49,999 | 4.5% |
| Number of persons in household | One | -11.4% |
| Householder/respondent gender | Female | 0.6% |
| Dwelling type | Apt. bldg. | -7.8% |
| Own/rent | Rent | 4.9% |

The largest differences (in absolute value) between the weighted survey data and the national Census data concern the number of persons in a household and dwelling type. One-person households are 15 percent of households in the weighted survey data compared with 26 percent of U.S. households, for a difference of 11 percent. Households living in apartment buildings are 14 percent of households in the weighted survey data compared with 22 percent of U.S. households, for a difference of about 8 percent. Neither the under representation of one-person households nor households living in apartment buildings is expected to bias the survey results in a particular direction. For the remaining demographic characteristics, the largest differences between the weighted survey data and the national Census data range between 1 and 6 percent.

**Household Size Distribution**

| Number of Persons in Household | Census % Dwelling Units[a] | Survey Estimate Less Census % Dwelling Units |
|---|---|---|
| One | 27% | -11.4% |
| Two | 33% | 5.5% |
| Three | 16% | 3.4% |
| Four | 15% | 0.3% |
| Five or more | 10% | 2.2% |
| **Total** | **100%** | |

[a] U.S. Census Bureau, American Housing Survey: 2001, Table 2-9.

**Age Distribution**

| Householder/ Respondent Age | Census % Householders[a] | Survey Estimate Less Census % Householders |
|---|---|---|
| 24 or younger[b] | 6% | 5.1% |
| 25-34 | 18% | 2.0% |
| 35-44 | 23% | 0.6% |
| 45-54 | 20% | 1.5% |
| 55-64 | 13% | -2.6% |
| 65-74 | 10% | -0.3% |
| 75 or older | 10% | -6.4% |
| **Total (%)** | 100% | |
| **Total (1,000s)** | 106,407 | |

[a] U.S. Census Bureau, American Housing Survey: 2001, Table 2-9.
[b] Census, 24 or younger; WebTV 2002, 18-24.

**Gender Distribution**

| Householder/Respondent Gender | Census % Householders[a] | Survey Estimate Less Census % Householders |
|---|---|---|
| Female | 51% | 0.6% |
| Male | 49% | -0.6% |
| **Total (%)** | 100% | |
| **Total (1,000s)** | 281,422 | |

[a] U.S. Census Bureau, Census 2000.

**Dwelling Type Distribution**

| Dwelling Type | Census % Dwelling Units[a] | Survey Estimate Less Census % Dwelling Units |
|---|---|---|
| Single-family, unattached | 60% | 6.8% |
| Single-family, attached | 7% | 3.7% |
| Apt. bldg. (>=2 units)[b] | 22% | -7.8% |
| Mobile home | 7% | -1.4% |
| Other | 5% | -1.4% |
| **Total (%)** | 100% | |
| **Total (1,000s)** | 111,730 | |

[a] U.S. Census Bureau, American Housing Survey: 2001, Table 2-1.

[b] Census, 2 or more units; WebTV 2002, 4 or more units.

**Own/Rent Distribution**

| Own/Rent | Census % Householders[a] | Survey Estimate Less Census % Households |
|---|---|---|
| Own | 68% | -4.9% |
| Rent | 32% | 4.9% |
| **Total (%)** | 100% | |
| **Total (1,000s)** | 106,407 | |

[a] U.S. Census Bureau, American Housing Survey: 2001, Table 2-1.

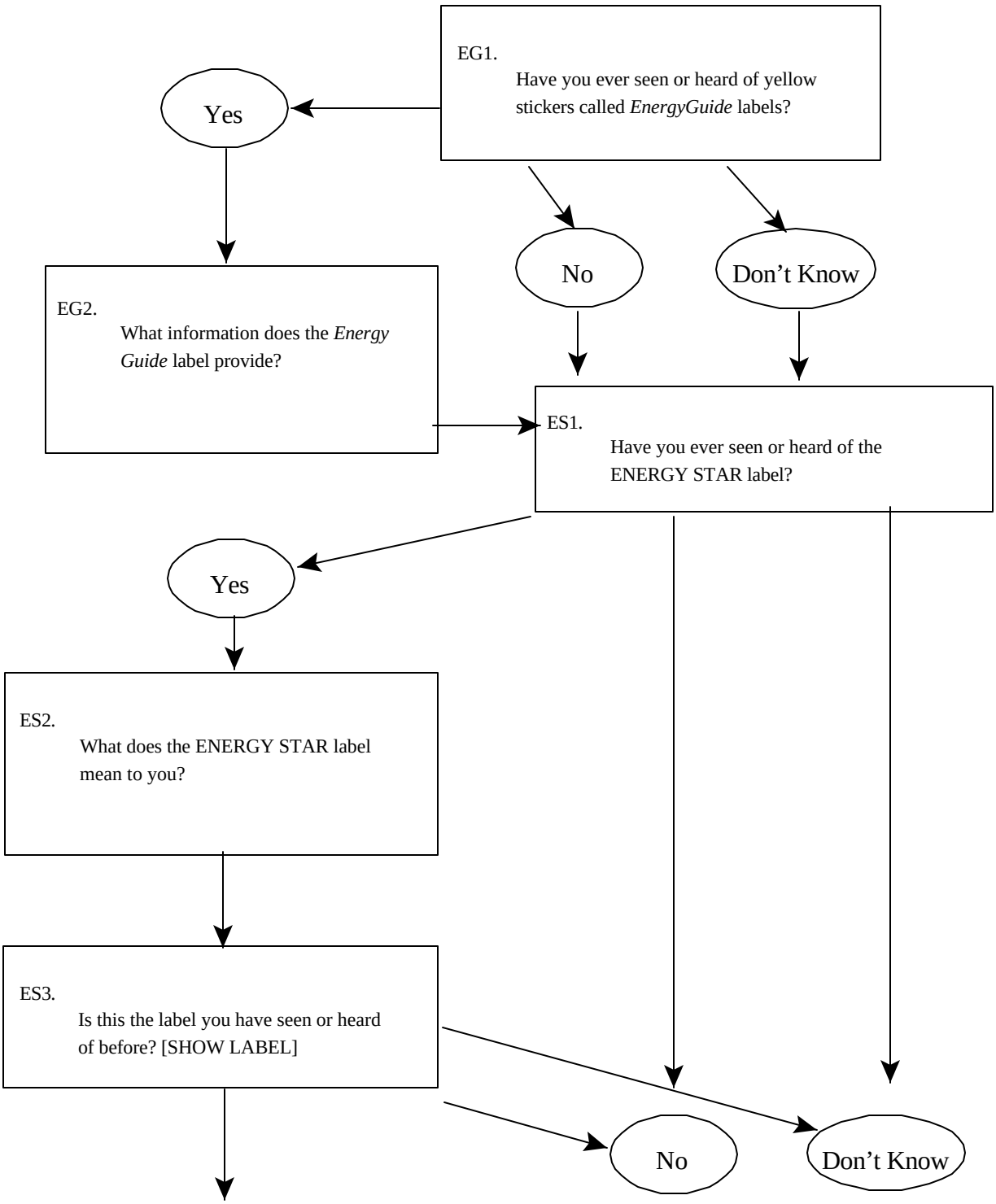
**Income Distribution**

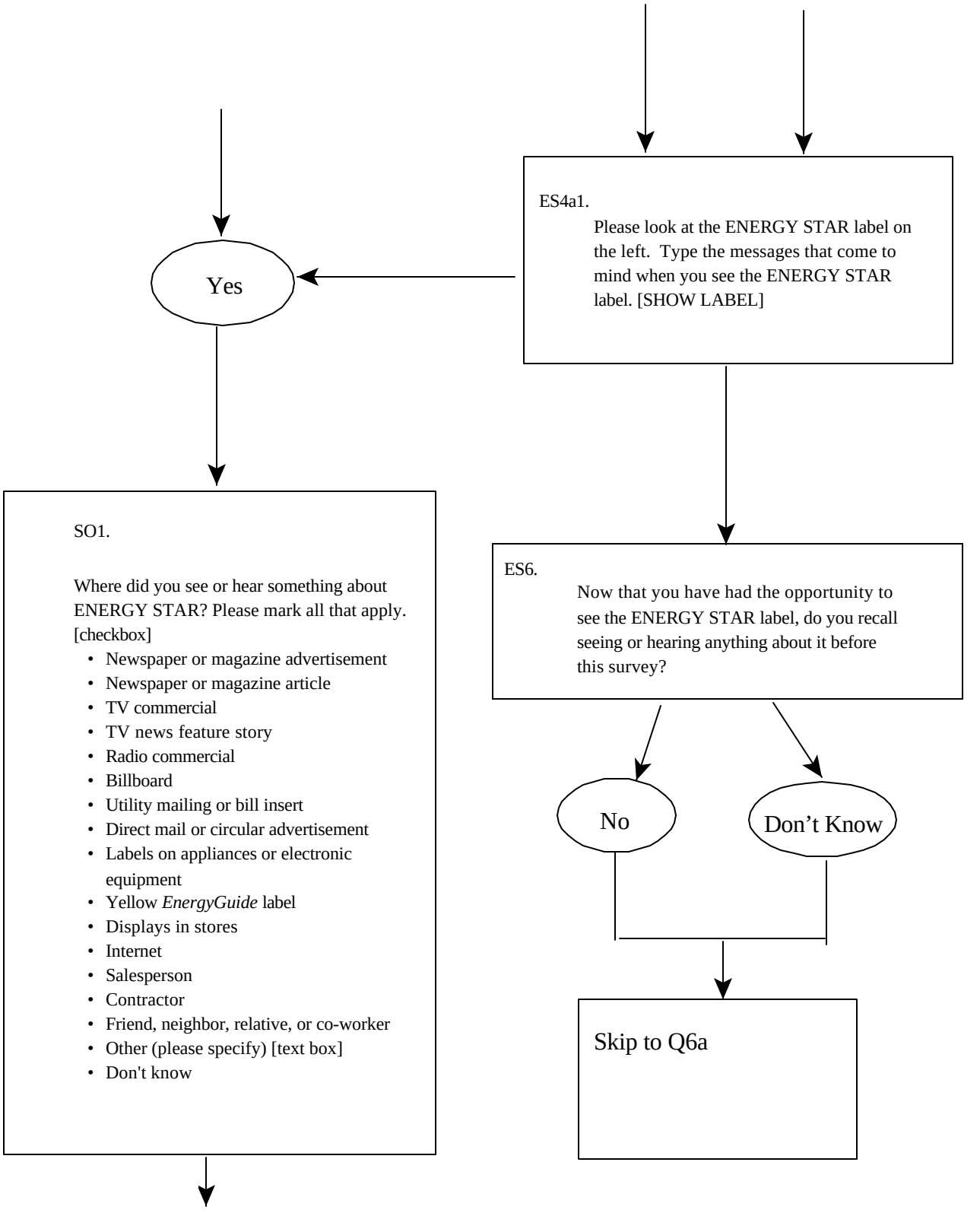
| Total Household Annual Income (before taxes) | Census % Households[a] | Survey Estimate Less Census % Households |
|---|---|---|
| Less than $15,000 | 16% | -0.8% |
| $15,000-$24,999 | 13% | -1.7% |
| $25,000-$49,999 | 28% | 4.5% |
| $50,000-$74,999 | 19% | 1.7% |
| $75,000 and over | 24% | -3.7% |
| **Total (%)** | 100% | |
| **Total (1,000s)** | 106,417 | |

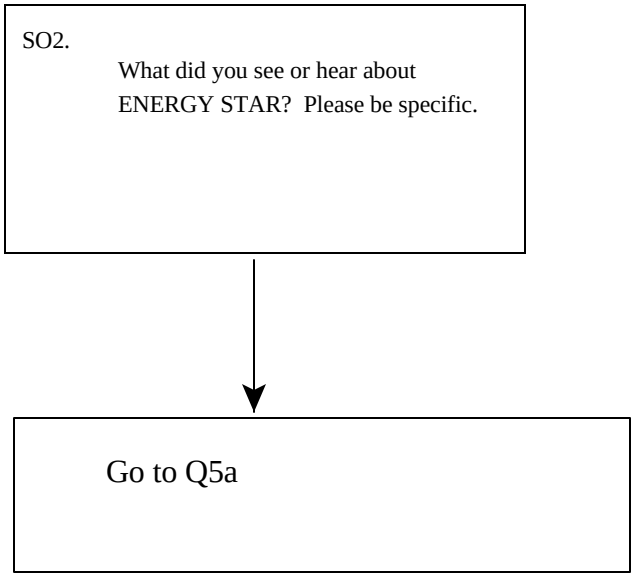
[a] U.S. Census Bureau, Current Population Reports, P60-2136, Money Income in the United States: 2000.

## APPENDIX C

**2002 CEE WebTV QUESTIONNAIRE** - final version, 9/06/02




ES4a1.
Please look at the ENERGY STAR label on the left. Type the messages that come to mind when you see the ENERGY STAR label. [SHOW LABEL]
Yes
SO1.
Where did you see or hear something about ENERGY STAR? Please mark all that apply. [checkbox]
• Newspaper or magazine advertisement
• Newspaper or magazine article
• TV commercial
• TV news feature story
• Radio commercial
• Billboard
• Utility mailing or bill insert
• Direct mail or circular advertisement
• Labels on appliances or electronic equipment
• Yellow *EnergyGuide* label
• Displays in stores
• Internet
• Salesperson
• Contractor
• Friend, neighbor, relative, or co-worker
• Other (please specify) [text box]
• Don't know
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?
No
Don't Know
Skip to Q6a


SO2.
What did you see or hear about ENERGY STAR? Please be specific.
Go to Q5a

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.

| | | |
|---|---|---|
| Heating and Cooling Products | Furnace or boiler | Fax machine |
| Home Office Equipment | Computer printer | Room air conditioner |
| Central air conditioner | Heat pump | Scanner |
| Computer or monitor | Copying machine | None of these products |
| | Thermostat | |

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.**

| | | |
|---|---|---|
| Home Appliances | Refrigerator | Compact fluorescent light bulb |
| Lighting | VCR | |
| Home Electronics | Lighting fixture | Microwave oven |
| Dishwasher | Audio product | None of these products |
| Television | Washing machine | |

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.**

| | | |
|---|---|---|
| Building Materials | Door | None of these products |
| Buildings | Skylight | |
| Window | Insulation | |
| Newly built home | Roofing material | |

Q6(a.) **Have you or someone else in your household been shopping in a store in the last 12 months for any of the products listed below?**

Yes
No
Don't Know

Heating and Cooling Products
- Central air conditioner
- Furnace or boiler
- Heat pump
- Thermostat
- Room air conditioner

Home Office Equipment
- Computer or monitor
- Computer printer
- Copying machine
- Fax machine
- Scanner

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

Home Electronics
- Television
- VCR
- Audio product

Building Materials
- Window
- Door
- Skylight
- Insulation
- Roofing material

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

Yes
No

Q12(a). **Please look at each of the groups of products again. Which of these products have you purchased in the last 12 months? Please check all that apply.**

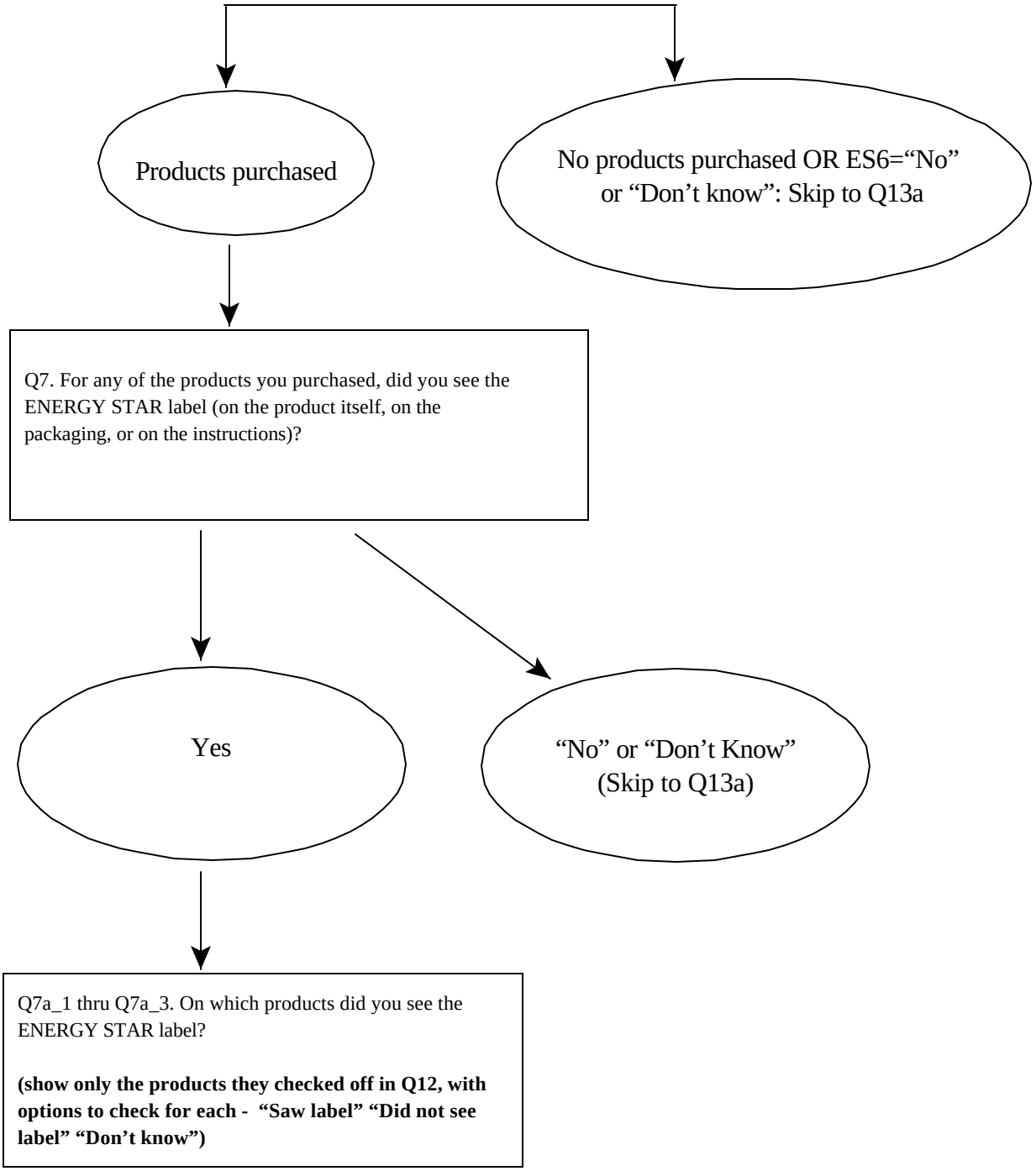
| | | |
|---|---|---|
| Heating and Cooling Products | Computer or monitor | Copying machine |
| Home Office Equipment | Furnace or boiler | Thermostat |
| Central air conditioner | Computer printer | Fax machine |
| | Heat pump | Room air conditioner |

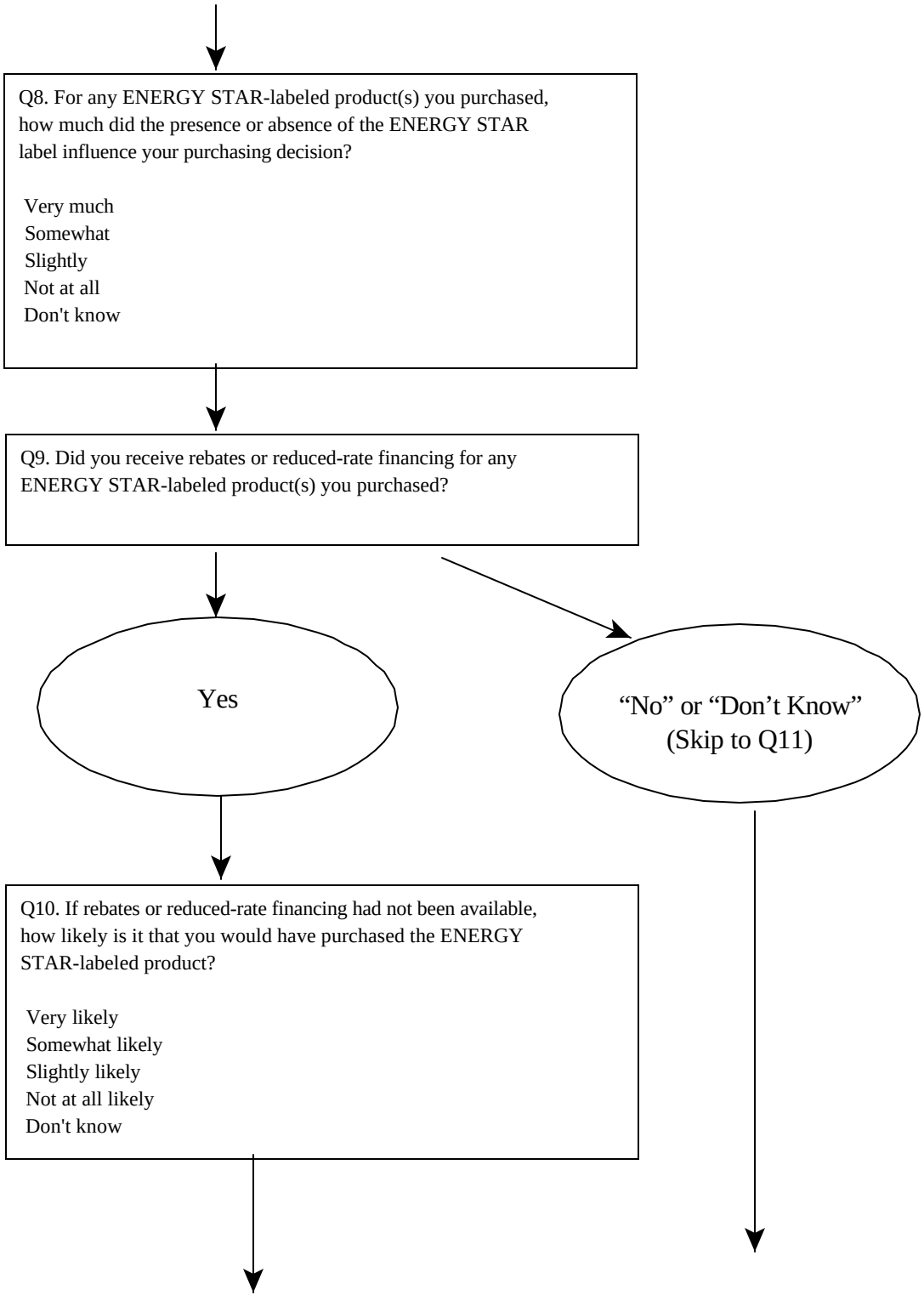
Q12(b). **Please continue reviewing the lists of products below. Which of these products have you purchased in the last 12 months? Please check all that apply.**

| | | |
|---|---|---|
| Home Appliances/Lighting | VCR | Microwave oven |
| Home Electronics | Lighting fixture | None of these products |
| Dishwasher | Audio product | |
| Television | Washing machine | |
| Refrigerator | Compact fluorescent light bulb | |

Q12(c). **Finally, please review the last of the product lists below. Which of these products have you purchased in the last 12 months? Please check all that apply.**

| | |
|---|---|
| Building Materials | Insulation |
| Buildings | Roofing material |
| Window | None of these products |
| Newly built home | |
| Door | |
| Skylight | |


Products purchased
No products purchased OR ES6="No" or "Don't know": Skip to Q13a
Q7. For any of the products you purchased, did you see the ENERGY STAR label (on the product itself, on the packaging, or on the instructions)?
Yes
"No" or "Don't Know" (Skip to Q13a)
Q7a_1 thru Q7a_3. On which products did you see the ENERGY STAR label?
(show only the products they checked off in Q12, with options to check for each - "Saw label" "Did not see label" "Don't know")


Q8. For any ENERGY STAR-labeled product(s) you purchased, how much did the presence or absence of the ENERGY STAR label influence your purchasing decision?
Very much
Somewhat
Slightly
Not at all
Don't know
Q9. Did you receive rebates or reduced-rate financing for any ENERGY STAR-labeled product(s) you purchased?
Yes
"No" or "Don't Know" (Skip to Q11)
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?
Very likely
Somewhat likely
Slightly likely
Not at all likely
Don't know

**Q11.** How likely are you to recommend ENERGY STAR-labeled products to a friend?

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

**Q13a.** Now, please think only about Heating and Cooling Products. Please select the source(s) of information you are most likely to use to obtain information about this product type. Please mark all that apply.

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

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

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

Go to demographic and closing questions.