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ENERGY STAR[®] and EnerGuide Labelling Awareness Survey 2018

Final Report

Prepared for Natural Resources Canada

Supplier Name: Phoenix SPI
Contract Number: 23483-190470-001_CY
Contract Value: \$85,509.36 (including HST)
Award Date: 2018-09-27
Delivery Date: 2019-03-21

Registration Number: POR 51-18

For more information on this report, please contact NRCan at: nrcan.por-rop.nrcan@canada.ca

Ce rapport est aussi disponible en français.

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March 2019

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Catalogue number: M144-295/1-2018E-PDF

International Standard Book Number (ISBN): 978-0-660-30809-8

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Executive Summary

Natural Resources Canada (NRCan) commissioned Phoenix SPI to conduct a public opinion study designed to take the pulse of the Canadian public and track changes in perceptions of the ENERGY STAR® and EnerGuide labels.

1. Background and Objectives

The Office of Energy Efficiency (OEE) administers two labelling programs to help ensure Canadians have access to energy efficient products and homes:

- The ENERGY STAR® labelling program marks high-efficiency products and homes in Canada. The symbol is intended to make it easy to identify the best energy performers on the market.
- Canada's EnerGuide program is a rating and labelling system intended to help consumers to make informed decisions about energy using products and homes.

The OEE conducts surveys to take the pulse of the Canadian public and track changes in perceptions of the ENERGY STAR® and EnerGuide labels to provide direction in furthering the development of its programs, services and initiatives.

The objectives of this survey were to measure:

- Canadians' awareness, understanding, attitudes and perceptions towards ENERGY STAR® and EnerGuide labelling; and
- The potential influences that might affect Canadians' purchase decisions.

This study represented the tenth wave of testing since November 2001. Earlier research was conducted in September 2016, June 2010, July 2007, August 2006, May 2005, November 2004, September 2003 and January 2003.

The findings will inform the development of targeted initiatives, monitor program effectiveness and support program evaluation activities. Results will be used by the OEE and its program partners, which include other levels of government as well as retail, manufacturing, public utilities and industries, to inform on-going and future policy development, communications and public engagement for many facets of energy efficiency policy in Canada.

2. Methodology

To address the research objectives, an online survey of Canadians age 18 and older was conducted. In previous waves of this research, the primary method of data collection was telephone.¹ While this year's data is not directly comparable to that of previous years,

¹ For more recent waves, the core ENERGY STAR awareness measures also were tested online, using an online omnibus, to provide data comparable to the U.S. Environmental Protection Agency's ENERGY STAR survey.

migrating the tracking survey online allows for better measurement of aided brand awareness, and it facilitates direct comparisons with data from the U.S. Environmental Protection Agency's ENERGY STAR survey. The results of the online survey cannot be generalized to the population because the survey sample is a non-probability sample. They can only be considered reflective of the views of online adult Canadians. Survey data has been weighted by region, age and gender to ensure results that are reflective of the Canadian population. The data collection was conducted December 1-21, 2018 using Research Now's panel of online Canadians.

3. Key Findings

ENERGY STAR®

When asked about their awareness of ENERGY STAR®, 50% of respondents acknowledged that they had heard, read, or seen something about the symbol. As expected, the proportion of Canadians aware of ENERGY STAR® increased when respondents were prompted with an image of the symbol. A substantial majority of respondents (88%) said they recalled seeing the ENERGY STAR® symbol when presented with an image of it.

Those aware of the ENERGY STAR® symbol were most likely to report seeing the symbol on a major appliance (77%). More than four in five (86%) of those aware of ENERGY STAR® said they associate the symbol with the concepts of “energy efficiency”, “low energy consumption”, or “saving energy”. By far, this is the main association Canadians have when thinking about the ENERGY STAR® symbol.

Respondents were then asked whether they agree or disagree with a series of attitudinal statements about ENERGY STAR products. The results show that attitudes towards ENERGY STAR® among both those aware and those not aware of the brand are generally positive.

Among the statements tested, those aware of ENERGY STAR® most often agreed that the symbol means they are getting a more efficient product (75%). Over two-thirds agreed that buying ENERGY STAR-labelled products makes them feel like they are helping to protect the environment and are confident that products which carry the ENERGY STAR® label have been rigorously tested and proven to be energy efficient (69% each). Approximately six in 10 agreed that these products provide more benefits than products that do not carry the ENERGY STAR® label (60%), and that buying ENERGY STAR-labelled products makes them feel they are contributing to society (59%). Just over half (53%) agreed that ENERGY STAR-labelled products offer better value than products without the label, and nearly half (48%) said they consider themselves loyal to ENERGY STAR-labelled products.

Among respondents unaware of the brand, half (51%) agreed that seeing the ENERGY STAR® label means they are getting a more efficient product and that buying ENERGY STAR products makes them feel like they are helping the environment for future generations (50%). Approximately four in 10 were confident that products which carry the ENERGY STAR® label have been rigorously tested and proven to be energy efficient (46%), agreed that buying ENERGY STAR-labelled products would make them feel like they are contributing to society (44%), and felt that such products would provide them with more benefits than products without the ENERGY STAR® label (40%). When it comes to value, 39% agreed that ENERGY STAR-labelled products would offer better value than products without the label. Respondents unaware of the brand were most likely to disagree that

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buying such products makes them feel like they are spending extra money for nothing (36%), or to express neutrality towards the statement (47%).

Turning to pricing, approximately six in 10 of those aware (62%) and 44% of those not aware (49%) of ENERGY STAR® would be willing to pay 5% more for an ENERGY STAR-labelled product. The likelihood of being willing to pay more for an ENERGY STAR-labelled product decreases as the price difference between a labelled and non-labelled product increases. Notably, respondents who did not agree that they would be willing to pay a premium for an ENERGY STAR-labelled product were more likely to be undecided than to state with certainty that they would not be willing to pay more.

Focusing on consumer behaviour, respondents were asked whether they had purchased products in seven different categories in the past 12 months. Among the products tested, respondents most often said they purchased lighting products (59%). Following this, approximately one-quarter said they purchased a home office product (27%) or a home electronic product (23%), and one-in-five (20%) purchased a home appliance. This was followed by purchases of a heating or cooling product (15%), windows or doors (11%), or a home or residence (8%).

Most of these recently purchased product(s) were identified as ENERGY STAR-certified product(s) by a majority of purchasers. Specifically, 77% of those who purchased home appliances in the last year said they purchased ENERGY STAR® products, 66% who purchased windows or doors purchased ones that were ENERGY STAR-certified, 65% of those who purchased heating or cooling products purchased ENERGY STAR® products, 62% of respondents who purchased lighting products purchased ENERGY STAR-certified ones, and 54% of those who purchased home electronics products said the products were ENERGY STAR-certified. When it came to homes or residences, 41% said they bought ENERGY STAR-certified ones, while 40% of purchasers of home office products said they were ENERGY STAR-certified.

Most respondents who purchased an ENERGY STAR-certified product said that the ENERGY STAR® brand influenced their purchase decision to some extent. Nearly half (48%) said they were *very* influenced by the label and one-third (33%) were *somewhat* influenced by the label.

When asked about potential reasons to purchase an ENERGY STAR® product, that vast majority (88%) said that saving money on their energy bill is an important reason, with 68% saying this is *very* important. Following this, 81% attributed importance to helping to protect the environment (50% said this is *very* important). Three-quarters (76%) attributed importance to benefiting from a financial incentive, with 40% identifying this as a *very* important reason to purchase an ENERGY STAR® product.

ENERGY STAR® Most Efficient designation

Turning to the ENERGY STAR® Most Efficient designation, one in five Canadians said they had seen, heard or read something about the designation. When respondents who recalled seeing the ENERGY STAR® Most Efficient symbol were asked what the designation meant to them, over half (59%) said it represents the best of the best/top ENERGY STAR performers, while just over half (51%) said it represents a subset of ENERGY STAR certified products. Almost four in 10 (37%) associated it with technological advancement/cutting edge technology, and over one-quarter (28%) with higher quality. Few (4%) said the symbol

meant nothing to them despite having seen, read or heard something about ENERGY STAR Most Efficient.

Financial Incentives

Three in 10 respondents (31%) claimed to be aware of financial incentives, rebates or tax exemptions offered for the purchase of ENERGY STAR-certified major appliances, home electronics, office equipment, lighting products, windows and doors, heating or cooling equipment or new homes. Just over half (51%) of the respondents aware of these financial incentives said they have benefited from or taken advantage of them when purchasing an ENERGY STAR-certified product.

Four in 10 respondents aware of these incentives and who benefited from them said they would *very* likely have purchased the ENERGY STAR® product(s) even if the incentives had not been available. An additional one-third said they would have been *somewhat* likely to have gone ahead with their purchase should the financial incentives, rebates, or tax exemptions not been available. In total, therefore, nearly three-quarters of these respondents would have been at least *somewhat* likely to have purchased these products without any type of financial incentive. Nearly one in five (18%) said they would have been *slightly* likely to have purchased the ENERGY STAR-labelled product without financial incentives, rebates, or tax exemptions, and 6% said they would have been not at all likely to do so.

ENERGY STAR® for Homes

Approximately one-third of respondents (31%) are aware that homes can also be ENERGY STAR-certified. Over two-thirds (69%) agreed that an ENERGY STAR-certified home would offer them better value than a home without (17% agreed *strongly* with this sentiment). When asked about the value of an ENERGY STAR-certified home, half agreed that they would purchase one of these homes even if it cost, on average, \$5,000 more than a home that is not certified. Following this, 44% said they would purchase an ENERGY STAR® home even if it cost \$10,000 more, 36% were undecided, and 19% said they would not pay more. When the price difference is \$15,000, the proportion saying they would buy an ENERGY STAR-certified home drops to 42%, with 37% undecided, and 21% saying they would not pay this price premium.

All ENERGY STAR-certified home features resonated with a majority of Canadians if they were in the market for a new home. At least three-quarters judged each feature to be important if they were in the market for a new home, and each feature was more likely to be judged very important than moderately important. Leading the way were efficient heating and cooling (86%), higher insulation levels (84%), and high performing window and doors (83%). A majority of respondents rated each of these features as *very* important. This was followed by ENERGY STAR-certified products, such as lighting, appliances, or air conditioners (78%), additional air-sealing (77%), and a whole-home ventilation system (76%).

Potential reasons why someone might want to purchase an ENERGY STAR-certified home resonated with most respondents on a personal level, with over three-quarters assigning at least moderate importance to each reason. Leading the way was saving money on one's energy bill, considered important by 88% of respondents (60% describing it as *very* important). This was followed by having a more comfortable home to live in in terms of balanced temperatures and improved air quality (83%), helping protect the environment (79%) and benefitting from a financial incentive, rebate, or tax incentive (78%).

Few respondents (6%) said they own an ENERGY STAR-certified home. Among those who do, 80% said it has efficient heating and cooling equipment, just over three-quarters said it is energy efficient and has efficient windows (77% each), and 59% said it has a heat recovery ventilator.

Nearly three-quarters (72%) of respondents who said they own an ENERGY STAR-certified home described it as warmer in the winter. Just over half described their home as having good indoor quality air (53%) and being cooler in the summer (52%), while almost half described their home as having balanced temperatures throughout and being quieter (49% each). Few (4%) described their ENERGY STAR-certified home as having none of these features.

EnerGuide Labelling Program

One-in-five respondents (21%) said they had heard, seen or read some about the EnerGuide Label. When respondents were shown the EnerGuide label symbol, nearly two-thirds (65%) said they recalled seeing this label. Respondents aware of the EnerGuide label were most likely to recall seeing it on refrigerators or freezers (64%) and clothes washers or dryers (60%). Nearly half said they recalled seeing a label on a range (49%) or dishwasher (46%). This was followed at a distance by a label on room air conditioners (22%), brochures for heating and cooling equipment (17%), in store displays (14%), an electronic panel in homes and brochures for gas fireplaces (8% each), the Internet (7%), a magazine or newspaper (6%), a new car (4%), and social media (2%).

In the last 12 months, Canadians reported purchasing a variety of consumer goods. This included new cars (14%), refrigerators or freezers (13%), heating or cooling equipment or clothes washer or dryer (12% each), a dishwasher or room air conditioner (10% each), a range or stove (9%), a new home (5%), and a gas fireplace (4%).

With one exception, a majority of respondents who purchased one of a list of consumer products, said they were influenced at least somewhat by the EnerGuide Label. The EnerGuide Label was most likely to influence those who purchased a gas fireplace and least likely to influence those who purchased a new car in the last year. In the case of a new car, fewer than half said they were at least somewhat influenced by the EnerGuide Label (39%).

4. Notes to Readers

- All results in the report are expressed as a percentage, unless otherwise noted.
- Throughout the report, percentages may not always add to 100 due to rounding and/or multiple responses being offered by respondents.
- The number of respondents changes throughout the report because questions were asked of sub-samples of survey respondents. Readers should be aware of this and exercise caution when interpreting results based on smaller numbers of respondents.
- Only subgroup differences that are statistically significant at the 95% confidence level and pertain to a subgroup of at least n=20 are described in the report. For the regional results, surveys completed by respondents from Nunavut are grouped with Ontario, and surveys completed by respondents from the Northwest Territories and the Yukon are grouped with British Columbia.

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- Tracking data are presented where available. With the exception of aided and unaided awareness of ENERGY STAR®, comparisons of all other data points over time should keep in mind the different methodologies—online data collection in 2018 versus telephone data collection in previous years. Direct comparisons between the 2018 data for awareness of ENERGY STAR® are possible because awareness was measured using both modes—online and telephone—in previous iterations of this survey.
 - The survey questionnaire is appended to the report.
 - The tabulated data is available under separate cover.
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Contract Value: \$85,509.36 (including HST)

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Alethea Woods
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Detailed Findings

A. ENERGY STAR®

1. Brand Awareness

This section provides insight into respondents' level of awareness of ENERGY STAR®.

Half aware of ENERGY STAR® on an unaided basis

When asked about their awareness of ENERGY STAR®, half of the respondents (50%) acknowledged that they had heard, read, or seen anything about the brand. Unaided awareness is three percentage points higher in 2018 than it was in 2016 when 47% of respondents were aware of ENERGY STAR® without prompting.

Table 1: Unaided Awareness of ENERGY STAR®

Unaided Awareness of ENERGY STAR®					
	2018	2016	2010	2007	2006
Yes, aware	50%	47%	54%	57%	51%
No, not aware	36%	40%	33%	34%	49%

Base for 2018: n=3,400; all respondents

Q1. Have you heard, read or seen anything about ENERGY STAR?

Aided awareness of ENERGY STAR® much higher than unaided awareness

As expected, awareness of ENERGY STAR® increased when respondents were presented with the following image:



A substantial majority (88%; up from 83% in 2016) said they recalled seeing the ENERGY STAR® symbol. Over time, aided awareness is one percentage point away from the high of 89% reported in 2010.

Table 2: Aided Awareness of ENERGY STAR®

Aided Awareness of ENERGY STAR®					
	2018	2016	2010	2007	2006
Yes, aware	88%	83%	89%	81%	81%
No, not aware	8%	12%	9%	16%	16%

Base for 2018: n=3,400; all respondents

Q2. Do you recall seeing this ENERGY STAR symbol?

Appliances—top source of awareness of ENERGY STAR®

Respondents aware of ENERGY STAR® (n=2,991) were most likely to report seeing the symbol on a major appliance (77%). This is consistent with survey data from previous years.² Since August 2006, appliances have been the source mentioned by the single greatest proportion of the respondents.

Table 3: Source of Awareness of ENERGY STAR®

Source of Awareness of ENERGY STAR®	
	%
On major appliances	77%
On a T.V., DVD or other audio products	29%
Displayed in a store on a sign	26%
From a public utility (hydro, gas, etc.)	22%
In promotional material for residential heating and cooling products	19%
On the Internet	16%
Displayed in a brochure	16%
In home or on home electrical panel	12%
In a magazine or newspaper	12%
In a promotional flyer from a retail establishment	12%
As part of advertising about climate change	10%
In promotional material for office equipment	5%
On social media	5%
Computer / laptop	1%
I can't recall	7%

Base: n=2,991; recall seeing the ENERGY STAR symbol

Q3. Where did you see the ENERGY STAR symbol? (multiple responses accepted)

One in five aware of ENERGY STAR® Most Efficient designation

Turning to the ENERGY STAR® Most Efficient designation, one in five Canadians said they had seen, heard or read something about the product designation. Conversely, the majority (57%) were not aware of the designation, and 23% said they did not know. When shown the ENERGY STAR® Most Efficient symbol and asked if they recalled seeing it, 19% of Canadians said they had.

Table 4: Awareness and Recall of ENERGY STAR® Most Efficient designation

Awareness of ENERGY STAR® most efficient designation		
	Unaided	Aided
Yes, aware	20%	19%
No, not aware	80%	81%

Base: n=3,400; all respondents

Q8. Have you ever seen, heard, or read anything about ENERGY STAR Most Efficient?

Q9. Do you recall seeing this symbol?

² With the exception of aided and unaided awareness of ENERGY STAR®, comparisons of all other data points over time should keep in mind the different methodologies—online data collection in 2018 versus telephone data collection in previous years. Direct comparisons between the 2018 data for awareness of ENERGY STAR® are possible because awareness was measured using both modes—online and telephone—in previous iterations of this survey.

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When the focus is on only those aware of ENERGY STAR® (n=2,991), the proportion of panellists aware of the ENERGY STAR® Most Efficient designation on an unaided basis increases to 22% and on an aided basis it increases to 21%. This is consistent with the results from 2016 when 20% of those aware of ENERGY STAR® recalled having seen, heard or read something about the ENERGY STAR® Most Efficient designation.

2. Understanding of the Brand

This section discusses respondents' understanding of the ENERGY STAR® brand.

Majority associate ENERGY STAR® symbol with energy savings

More than four in five (86%) of those aware of ENERGY STAR® (n=2,991) said they associate the symbol with the concepts of “energy efficiency”, “low energy consumption”, or “saving energy”. This is by far the main association Canadians appear to have when thinking about the ENERGY STAR® symbol and is consistent with the results from previous iterations of this survey.

Following references to energy efficiency, close to half associate it with “saving money” (47%) and the perception that it is “good for the environment” (44%), while smaller proportions think it means “higher quality” or “better made products” (15%), “government backed” (14%), and “third-party certified (10%). Few (3%) said the symbol meant nothing to them despite having seen, read or heard something about ENERGY STAR®.

Table 5: Understanding of ENERGY STAR®

Understanding of ENERGY STAR® symbol	
	%
Energy efficient/low energy consumption/saves energy	86%
Saves money	47%
Good for the environment/mentions of green	44%
Higher quality/made better	15%
Government backed	14%
Third-party certified	10%
Nothing/doesn't mean anything to me	3%

Base: n=2,991; recall seeing the ENERGY STAR symbol

Q4. What does the ENERGY STAR symbol mean to you? (multiple responses accepted)

Respondents who said the symbol means more than one thing to them (n=1,777) were asked which of them **most** reflects what the symbol means to them. In response, a substantial majority (87%) said that the designation means “saving energy” or “more efficient”. This was followed at a distance by similar proportions who explained that the designation suggests “saving money” (18%), or “environmental friendliness” (16%). Small proportions explained that it means “higher quality/better made (7%), “government backed (5%), or “third-party certified (3%).

Majority Associate ENERGY STAR® Most Efficient with Energy Savings

Over half (59%) of those aware of the ENERGY STAR® Most Efficient symbol (n=616) said it represents the best of the best/top ENERGY STAR® performers, while just over half (51%) said it represents a subset of ENERGY STAR® certified products. Over one-third (37%) associated it with technological advancement/cutting edge technology, and over one-quarter (28%) with higher quality. Few (4%) said the symbol meant nothing to them despite having seen, read or heard something about ENERGY STAR® Most Efficient.

Table 6: Understanding of ENERGY STAR® Most Efficient

Understanding of ENERGY STAR® Most Efficient	
Statements	%
Represent the best of the best/Top ENERGY STAR performers	59%

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Represent a subset of ENERGY STAR certified products	51%
Technologically advanced/Cutting edge technology	37%
Higher quality/model better	28%
Nothing/Doesn't mean anything to me	4%

Base: n=616; those who recall seeing ENERGY STAR Most Efficient symbol

Q10. What does ENERGY STAR Most Efficient mean to you? (multiple responses accepted)

Respondents for whom ENERGY STAR Most Efficient® means several things (n=267) were asked which of those things reflects **most** what it means to them. In response, just over half (52%) said it represents the best of the best/top ENERGY STAR® performers. This was followed at a distance by one-quarter who said it represents a subset of ENERGY STAR® certified products, 15% who associated it with technological advancement/cutting edge technology, and 8% who associated it with higher quality.

3. Attitudes towards ENERGY STAR® Brand and Products

This section of the report deals with respondents' perceptions of the ENERGY STAR® brand and products.

Positive attitudes towards ENERGY STAR® among those aware

Respondents aware of ENERGY STAR® (n=2,991) were asked whether they agree or disagree with a series of attitudinal statements about ENERGY STAR products. These statements were:

- *Buying ENERGY STAR-labelled products makes me feel like I'm helping to protect the environment for future generations.*
- *If I see the ENERGY STAR label, I know I am getting a more efficient product.*
- *Buying ENERGY STAR-labelled products makes me feel like I'm contributing to society.*
- *ENERGY STAR-labelled products provide me with more benefits than products without the ENERGY STAR label.*
- *ENERGY STAR-labelled products offer better value than products without the label.*
- *Buying ENERGY STAR-labelled products makes me feel like I'm spending extra money for nothing*
- *I consider myself loyal to ENERGY STAR-labelled products.*
- *I am confident that products which carry the ENERGY STAR label have been rigorously tested and proven to be energy efficient.*

Among the statements tested, those aware of ENERGY STAR® most often agreed that ENERGY STAR® means they are getting a more efficient product. Three-quarters expressed this view, though a majority (53%) expressed moderate as opposed to strong agreement. Those who did not agree with this statement were more likely to be neutral than to express disagreement.

Over two-thirds (69%) agreed that buying ENERGY STAR-labelled products makes them feel like they are helping to protect the environment and are confident that products which carry the ENERGY STAR® label have been rigorously tested and proven to be energy efficient. In both cases, these respondents were much more likely to express strong than moderate agreement, and those who did not agree with either statement were more likely to be neutral than to express disagreement.

Approximately six in 10 agreed that these products provide more benefits than products that do not carry the ENERGY STAR® label (60%), and that buying ENERGY STAR-labelled products makes them feel they are contributing to society (59%). In both cases, these respondents were much more likely to express moderate than strong agreement, and those who did not agree with either statement were more likely to be neutral than to express disagreement.

Roughly half (53%) agreed that ENERGY STAR-labelled products offer better value than products without the label, with agreement more likely to be moderate than strong. Those who did not agree with this statement were more likely to be neutral than to express disagreement.

Nearly half (48%) said they consider themselves loyal to ENERGY STAR-labelled products, with most of the rest (39%) expressing neutrality. Respondents were more likely to disagree

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than agree that buying ENERGY STAR-labelled products makes them feel they are spending extra money for nothing (54% disagree, 18% agree).

Table 7: Attitudes Towards ENERGY STAR® Brand [Those Aware]

Attitudes Towards ENERGY STAR® Brand [Those Aware]					
Statements	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
<i>Buying ENERGY STAR-labelled products makes me feel like I'm helping to protect the environment for future generations</i>	20%	49%	24%	4%	2%
<i>If I see the ENERGY STAR label, I know I am getting a more efficient product</i>	22%	53%	21%	2%	2%
<i>Buying ENERGY STAR-labelled products makes me feel like I'm contributing to society</i>	15%	44%	32%	6%	3%
<i>ENERGY STAR-labelled products provide me with more benefits than products without the ENERGY STAR label</i>	14%	46%	34%	5%	2%
<i>ENERGY STAR-labelled products offer better value than products without the label</i>	13%	40%	39%	6%	2%
<i>Buying ENERGY STAR-labelled products makes me feel like I'm spending extra money for nothing</i>	5%	13%	27%	37%	17%
<i>I consider myself loyal to ENERGY STAR-labelled products</i>	13%	35%	39%	10%	4%
<i>I am confident that products which carry the ENERGY STAR label have been rigorously tested and proven to be energy efficient</i>	19%	51%	24%	3%	2%

Base: n=2,991; recall seeing the ENERGY STAR symbol

Q6. Please tell me whether you agree or disagree with each of the following statements.

Table 8: Attitudes Towards ENERGY STAR® Brand Over Time [Those Aware]

While attitudes towards ENERGY STAR® among aware respondents had been fairly consistent from 2006 to 2016, noteworthy differences were recorded this year³ with greater proportions of respondents reporting positive perceptions of the brand. The exception was value for money, where there has been an increase in the proportion of respondents who feel that buying ENERGY STAR-labelled products is spending extra money for nothing (18% in 2018 versus 12% in 2016).

Those Aware of ENERGY STAR® -- 2006 to 2018					
Statements	% agreeing [scores of 4-5]				
	2018	2016	2010	2007	2006
<i>Buying ENERGY STAR-labelled products makes me feel like I'm helping to protect the environment for future generations</i>	69%	67%	71%	76%	74%

³ A reminder to readers: comparisons over time should keep in mind the different methodologies—online data collection in 2018 versus telephone data collection in previous years.

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<i>I am confident that products which carry the ENERGY STAR label have been rigorously tested and proven to be energy efficient.</i>	70%	61%	63%	--	--
<i>Buying ENERGY STAR-labelled products makes me feel like I'm contributing to society.</i>	59%	52%	59%	63%	61%
<i>ENERGY STAR-labelled products provide me with more benefits than products without the ENERGY STAR label.</i>	60%	49%	48%	50%	49%
<i>ENERGY STAR-labelled products offer better value than products without the label.</i>	53%	44%	37%	41%	42%
<i>Buying ENERGY STAR-labelled products makes me feel like I'm spending extra money for nothing.</i>	18%	12%	10%	9%	9%

ENERGY STAR® can tolerate slightly higher price point

Turning to pricing, approximately six in 10 respondents aware of ENERGY STAR® (62%) would be willing to pay 5% more for an ENERGY STAR-labelled product. The likelihood of being willing to pay more for an ENERGY STAR-labelled product decreases as the price difference between a labelled and non-labelled product increases. While a majority (56%) would pay 10% more for an ENERGY STAR-labelled product, fewer than half (47%) would buy an ENERGY STAR-labelled product that cost 15% more than a similar product without a label.

Respondents who did not agree that they would pay more for an ENERGY STAR-labelled product were more likely to be undecided than to state with certainty that they would not be willing to pay more.

Table 9: Perceived Value (\$) of ENERGY STAR® Brand [Those Aware]

Perceived Value (\$) of ENERGY STAR® Brand [Those Aware]					
Statements	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
<i>I would purchase an ENERGY STAR-labelled product even if it cost 5% more than a similar product without the label</i>	16%	46%	28%	6%	4%
<i>I would purchase an ENERGY STAR-labelled product even if it cost 10% more than a similar product without the label</i>	13%	43%	30%	10%	4%
<i>I would purchase an ENERGY STAR-labelled product even if it cost 15% more than a similar product without the label</i>	10%	37%	34%	14%	5%

Base: n=2,991; recall seeing the ENERGY STAR symbol [split sample]
Q5. Please tell me whether you agree or disagree with each of the following statements

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Table 10: Perceived Value (\$) of ENERGY STAR® Brand Over Time [Those Aware]

Canadians' willingness to pay a price premium for ENERGY STAR-labelled products has increased since 2016.⁴

Those Aware of ENERGY STAR® -- 2006 to 2018					
Statements	% agreeing [scores of 4-5]				
	2018	2016	2010	2007	2006
<i>I would purchase an ENERGY STAR-labelled product even if it cost 5% more than a similar product without the label.</i>	62%	53%	62%	68%	62%
<i>I would purchase an ENERGY STAR-labelled product even if it cost 10% more than a similar product without the label.</i>	56%	48%	52%	49%	51%
<i>I would purchase an ENERGY STAR-labelled product even if it cost 15% more than a similar product without the label.</i>	47%	40%	46%	50%	47%

Positive attitudes towards ENERGY STAR® among those unaware

Respondents unaware of ENERGY STAR® (n=409) were provided the following description before being asked whether they agree or disagree with a series of attitudinal statements about ENERGY STAR products.

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

These statements were:

- *Buying ENERGY STAR-labelled products would make me feel like I'm helping to protect the environment for future generations.*
- *If I see the ENERGY STAR label, I know I would be getting a more efficient product.*
- *Buying ENERGY STAR-labelled products would make me feel like I'm contributing to society.*
- *ENERGY STAR-labelled products would provide me with more benefits than products without the ENERGY STAR label.*
- *ENERGY STAR-labelled products would offer better value than products without the label.*
- *Buying ENERGY STAR-labelled products would make me feel like I'm spending extra money for nothing.*
- *I am confident that products which carry the ENERGY STAR label have been rigorously tested and proven to be energy efficient.*

Respondents who were unaware of ENERGY STAR® tended to be divided between positive and neutral attitudes toward the brand on most of these points.

⁴ Once again, interpretations of comparisons over time should keep in mind the different methodologies—online data collection in 2018 versus telephone data collection in previous years.

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Half (51%) feel that seeing the ENERGY STAR® label means they are getting a more efficient product and agreed that buying ENERGY STAR products makes them feel like they are helping the environment for future generations (50%). Respondents who did not agree with either statement were more likely to be neutral than to express disagreement.

Approximately four in 10 were confident that products which carry the ENERGY STAR® label have been rigorously tested and proven to be energy efficient (46%), agreed that buying ENERGY STAR-labelled products would make them feel like they are contributing to society (44%), and felt that such products would provide them with more benefits than products without the ENERGY STAR® label (40%). In each case, most of those who did not agree with these statements were neutral as opposed to expressing disagreement.

When it comes to value, 39% of respondents unaware of ENERGY STAR products agreed that ENERGY STAR-labelled products would offer better value than products without the label. Just over half (52%) were neutral about this.

Respondents were most likely to disagree that buying such products makes them feel like they are spending extra money for nothing (36%) or to express neutrality towards the statement (47%).

Table 11: Attitudes Towards ENERGY STAR® Brand [Those Unaware]

Attitudes Towards ENERGY STAR® Brand [Those Unaware]					
Statements	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
<i>Buying ENERGY STAR-labelled products would make me feel like I'm helping to protect the environment for future generations</i>	12%	38%	44%	5%	2%
<i>If I see the ENERGY STAR label, I know I would be getting a more efficient product</i>	13%	38%	43%	5%	2%
<i>Buying ENERGY STAR-labelled products would make me feel like I'm contributing to society</i>	10%	34%	46%	6%	4%
<i>ENERGY STAR-labelled products would provide me with more benefits than products without the ENERGY STAR label</i>	10%	30%	53%	5%	2%
<i>ENERGY STAR-labelled products would offer better value than products without the label</i>	8%	31%	52%	6%	2%
<i>Buying ENERGY STAR-labelled products would make me feel like I'm spending extra money for nothing</i>	5%	12%	47%	28%	8%
<i>I am confident that products which carry the ENERGY STAR label have been rigorously tested and proven to be energy efficient</i>	13%	33%	47%	5%	2%

Base: n=409; those unaware of ENERGY STAR symbol

Q7. Please tell me whether you agree or disagree with each of the following statements.

ENERGY STAR® can tolerate slightly higher price point

Turning to pricing, more than four in 10 (44%) of those unaware of ENERGY STAR® would be willing to pay 5% more for an ENERGY STAR-labelled product. The likelihood of being willing to pay more for an ENERGY STAR-labelled product decreases as the price difference between a labelled and non-labelled product increases. Once again, respondents who did not agree that they would pay a premium for an ENERGY STAR-labelled product were more likely to be undecided than to state with certainty that they would not be willing to pay more.

Table 12: Perceived Value (\$) of ENERGY STAR® Brand [Those Unaware]

Perceived Value (\$) of ENERGY STAR® Brand [Those Unaware]					
Statements	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
<i>I would purchase an ENERGY STAR-labelled product even if it cost 5% more than a similar product without the label</i>	9%	35%	38%	5%	13%
<i>I would purchase an ENERGY STAR-labelled product even if it cost 10% more than a similar product without the label</i>	2%	26%	55%	12%	6%
<i>I would purchase an ENERGY STAR-labelled product even if it cost 15% more than a similar product without the label</i>	5%	20%	54%	15%	6%

Base: n=409; those unaware of ENERGY STAR symbol [split sample]
 Q7. Please tell me whether you agree or disagree with each of the following statements

4. Purchasing Habits

This section provides insight into the purchasing habits of Canadians, including the potential influence of the ENERGY STAR® brand on these purchases.

Lighting products most commonly purchased products

Respondents were asked whether they had purchased products in seven different categories in the past 12 months. Among the products tested, respondents most often said they purchased lighting products (59%). Following this, approximately one-quarter said they purchased a home office product (27%) or a home electronic product (23%). One-in-five (20%) purchased a home appliance in the last 12 months. This was followed by purchases of a heating or cooling product (15%), windows or doors (11%), and a home or residence (8%) in the last year.

Table 13: Home Products Purchased or Shopped for in the Last 12 Months

Home Products Purchased or Shopped for in the Last 12 Months			
	Purchased	Shopped for but not purchased	Neither
Lighting products	59%	10%	31%
Home office products	27%	16%	58%
Home electronics	23%	18%	59%
Home appliances	20%	14%	66%
Heating and cooling products	15%	11%	74%
Windows or doors	11%	11%	78%
A home or residence	8%	13%	80%

Base: n=3,400; all respondents

Q15. For each of the following categories of products, please tell me whether you have purchased or shopped for one in the last 12 months. (multiple responses accepted)

Purchasing habits are similar to those reported in 2016, when lighting products led the way at 68%, followed by home office products (31%), home electronics (27%), and home appliances (23%).

Variety of recent purchases were ENERGY STAR®-certified

Most of these recently purchased product(s) were identified as ENERGY STAR®-certified product(s) by a majority of purchasers. Specifically, 77% of those who purchased home appliances in the last year said they purchased ENERGY STAR® products, 66% who purchased windows or doors purchased ones that were ENERGY STAR®-certified, 65% of those who purchased heating or cooling products purchased ENERGY STAR® products, 62% of respondents who purchased lighting products purchased ENERGY STAR®-certified ones, and 54% of those who purchased home electronics products said the products were ENERGY STAR-certified. Between 11% and 19% of these respondents said that the products they bought in the last 12 months were not ENERGY STAR®-certified products (the rest did not know).

When it came to a home or residence, respondents were closely divided between those who purchased an ENERGY STAR®-certified home or residence (41%), and those who did not (38%). Approximately one-in-five (21%) did not know whether the home or residence they bought was ENERGY STAR®-certified.

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When it came to home office products, respondents were closely divided among those who bought ENERGY STAR®-certified products (40%) and those who did know whether the home office product they bought was ENERGY STAR®-certified (37%). Approximately one-quarter (23%) said the home or office products they bought were not ENERGY STAR®-certified.

Table 14: Proportion of Recent Purchases that were ENERGY STAR®-Certified

Proportion of Recent Purchases that were ENERGY STAR®-Certified			
	Yes	No	Don't know / not sure
Home appliance	77%	13%	10%
Windows or doors	66%	16%	18%
Heating or cooling product	65%	16%	19%
Lighting product	62%	11%	27%
Home electronics product	54%	19%	27%
Home or residence	41%	38%	21%
Home office product	40%	23%	37%

Base: n=249-2,009; respondents who purchased a product
Q16. Was the [INSERT CATEGORY] you most recently purchased ENERGY STAR-certified?

This year, a greater proportion of respondents reported that these recent purchases were ENERGY STAR®-certified. Once again, when interpreting comparisons over time, keep in mind the different methodologies—online data collection in 2018 versus telephone data collection in previous years.

Table 15: Proportion of Recent Purchases that were ENERGY STAR®-Certified Over Time

Proportion of Recent Purchases that were ENERGY STAR®-Certified Over Time		
	2018	2016
Home appliance	77%	68%
Windows or doors	66%	60%
Heating or cooling product	65%	59%
Lighting product	62%	53%
Home electronics product	54%	42%
Home or residence	41%	23%
Home office product	40%	35%

Most Influenced by ENERGY STAR® brand at least slightly

Most respondents who purchased an ENERGY STAR®-certified product (n=1,605) said that the ENERGY STAR® brand influenced their purchase decision to some extent. Nearly half (48%) said they were *very* influenced by the label and one-third (33%) were *somewhat* influenced by the label. Conversely, approximately one in 10 (11%) were influenced *slightly* by the label and 6% said the ENERGY STAR® label did not at all influence their purchase decision.

Table 16: Influence of ENERGY STAR® brand

	%
Very much	48%
Somewhat	33%
Slightly	11%
Not at all	6%

Base: n=1,605; respondents who purchased an ENERGY STAR® product

Q17. How much did the ENERGY STAR label influence your decision to purchase an ENERGY STAR-certified [INSERT ENERGY STAR PRODUCT CATEGORY FROM Q15]?

When new homes or residences are excluded, the influence of the ENERGY STAR® brand is unchanged.

The table below shows the influence of the ENERGY STAR® brand on each category of products.

Table 17: Influence of ENERGY STAR® Brand on Purchase

Influence of ENERGY STAR® Brand on Purchase					
	Very much	Somewhat	Slightly	Not at all	Don't know / not sure
Home or residence	58%	33%	8%	1%	--
Building materials product	50%	35%	13%	2%	1%
Heating or cooling product	53%	34%	9%	3%	0%
Home appliance	50%	33%	10%	6%	1%
Lighting product	44%	37%	11%	7%	2%
Home electronics product	42%	36%	11%	8%	2%
Home office product	37%	39%	13%	8%	2%

Base: n=1,605; respondents who purchased an ENERGY STAR® product

Q17. How much did the ENERGY STAR label influence your decision to purchase an ENERGY STAR-certified [INSERT ENERGY STAR PRODUCT CATEGORY FROM Q15]?

Compared to 2016, there has been a decline in the proportion of respondents saying their home or residence purchase was very much influenced by the ENERGY STAR® brand. In contrast, there has been an increase in the proportion of respondents saying this about their purchase of a heating or cooling product, home appliance, home electronics product, and home office product. Once again, when interpreting comparisons over time, keep in mind the different methodologies—online data collection in 2018 versus telephone data collection in previous years.

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Table 18: Influence of ENERGY STAR® Brand on Purchase Over Time

Influence of ENERGY STAR® Brand on Purchase – Over Time		
	% saying very much	
	2018	2016
Home or residence	58%	67%
Building materials product	50%	--
Heating or cooling product	53%	36%
Home appliance	50%	39%
Lighting product	44%	45%
Home electronics product	42%	35%
Home office product	37%	24%

Saving money, helping the environment—top reasons for buying ENERGY STAR® labelled products

When asked about potential reasons to purchase an ENERGY STAR® product, the vast majority (88%) said that saving money on their energy bill is an important reason, with 68% saying it is *very important*. Following this, 81% attributed importance to helping to protect the environment (50% said it is *very important*). Just over three-quarters (76%) attributed importance to benefiting from a financial incentive (40% rating this as a *very important* reason to purchase an ENERGY STAR® product).

Table 19: Importance of Different Reasons to Buy an ENERGY STAR®-Labelled Product

Importance of Different Reasons to Buy an ENERGY STAR®-Labelled Product						
	Very Important	Somewhat Important	Neutral	Not Very Important	Not at all Important	Don't Know
Saving money on your energy bill	68%	20%	9%	0%	0%	1%
Helping to protect the environment	50%	31%	14%	2%	1%	1%
Benefiting from a financial incentive	40%	36%	18%	2%	1%	3%

Base: n=3,400; all respondents

Q21. There are many possible reasons to buy an ENERGY STAR-labelled product. How important are each of the following reasons to you personally?

The importance attributed to different reasons are similar to 2016, when saving money led the way followed by helping to protect the environment, and benefiting from a financial incentive.

5. ENERGY STAR® Financial Incentives

This section of the report deals with respondents' awareness and use of ENERGY STAR® financial incentives, rebates or tax exemptions.

Three in 10 aware of ENERGY STAR® financial incentives

Three in 10 respondents (31%) claimed to be aware of financial incentives, rebates or tax exemptions offered for the purchase of ENERGY STAR®-certified major appliances, home electronics, office equipment, lighting products, windows and doors, heating or cooling equipment or new homes.

Table 20: Awareness of ENERGY STAR® Financial Incentives

Awareness of ENERGY STAR® Financial Incentives	
	%
Yes, aware	31%
No, not aware	69%

Base: n=3,400; all respondents

Q18. Are you aware of any financial incentives, rebates or tax exemptions offered for the purchase of ENERGY STAR certified products?

Awareness is virtually unchanged over time. In 2016, 29% were aware of these incentives compared to 31% in 2018.

Half have benefited from ENERGY STAR® financial benefits

Among respondents aware of financial incentives, rebates, or tax exemptions offered for the purchase of ENERGY STAR®-certified products (n=546), half (51%) have benefited from or taken advantage of them (up from 44% in 2016).

Table 21: Benefited from ENERGY STAR® Financial Incentives

Benefited from ENERGY STAR® Financial Incentives	
	%
Yes	51%
No	40%
Don't know/ not sure	9%

Base: n=1,019; respondents aware of financial incentives

Q19. Have you ever benefited from or taken advantage of financial incentives, rebates or tax exemptions in the purchasing of ENERGY STAR certified major appliances, home electronics, office equipment, lighting products, windows and doors, heating or cooling equipment or new homes?

Most at least somewhat likely to purchase ENERGY STAR® products without financial benefits

Four in 10, or 41%, of respondents aware of these incentives and who benefited from them (n=524) said they would *very likely* have purchased the ENERGY STAR® product(s) even if the incentives had not been available. An additional one-third said they would have been *somewhat likely* to have gone ahead with their purchase should the financial incentives, rebates, or tax exemptions not been available. In total then, approximately three-quarters of these respondents would have been at least *somewhat likely* to have purchased these products without any type of financial incentive.

Nearly one in five (18%) said they would have been *slightly likely* to have purchased the ENERGY STAR®-labelled product without financial incentives, rebates, or tax exemptions and 6% said it is not at all likely that they would have done so without them.

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Table 22: Influence of ENERGY STAR® Financial Incentive

Influence of ENERGY STAR® Financial Incentive	
	%
Very likely	41%
Somewhat likely	33%
Slightly likely	18%
Not at all likely	6%
Don't know / Not sure	3%

Base: n=524; those aware of and benefit from ENERGY STAR financial incentives

Q20. If financial incentives, rebates or tax exemptions had not been available, how likely is it that you would have purchased the ENERGY STAR-labelled product?

6. ENERGY STAR® for Homes

This section of the report deals with respondents' awareness and perceptions of the ENERGY STAR certification for homes, as well as the potential influence of the designation on their purchasing behaviour.

One in three aware of ENERGY STAR® for homes

One in three (31%) said that they are aware that homes can also be ENERGY STAR®-certified. The majority, 69%, were not aware that homes could be ENERGY STAR®-certified. Awareness is down since 2016 when 36% of respondents reported awareness of this certification for homes.

Table 23: Awareness of ENERGY STAR® Home Over Time

Awareness of ENERGY STAR® Home Over Time		
	2018	2016
Yes	31%	36%
No	69%	63%

Base: n=3,400; all respondents

Q12. Are you aware that homes can also be ENERGY STAR-certified?

Before continuing, respondents were provided the following description of ENERGY STAR® for Homes:

The international ENERGY STAR® symbol and label is a simple way for consumers to identify an energy-efficient home. The same way some products and appliances feature an ENERGY STAR® blue label to signify energy efficiency, new homes may be ENERGY STAR®-labelled to demonstrate higher level of energy efficiency. These homes have increased comfort, save you money on energy bills and help reduce GHG emissions.

Canadians hold positive perceptions of ENERGY STAR® for homes

Over two-thirds (69%) agreed that an ENERGY STAR®-certified home would offer them better value than a home without (17% agreed *strongly* with this sentiment). The rest were more likely to be neutral (27%) than to express any level of disagreement (4%).

Table 24: Perceptions of ENERGY STAR® for Home Over Time

Perceptions of ENERGY STAR® for Home Over Time		
	2018	2016
Strongly agree	17%	33%
Agree	52%	33%
Neutral	27%	26%
Disagree	2%	4%
Strongly disagree	2%	4%

Base for 2018: n=3,400; all respondents

Q13. To what extent do you agree or disagree with the following statements? -- An ENERGY STAR-certified home would offer better value than a home without this certification.

Over time, the proportion of respondents agreeing that an ENERGY STAR®-certified home would offer them better value than a home without remains the same. What has changed is the proportion of respondents strongly agreeing with this statement, which has declined from 33% in 2016 to 17% in 2018.

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When asked about the value of an ENERGY STAR®-certified home, exactly half agreed that they would purchase one of these homes even if it cost, on average, \$5,000 more than a home that is not certified. Only 17% disagree, and one-third were undecided.

Indecision and disagreement increase with the price difference. Specifically, 44% said they would purchase an ENERGY STAR® certified home even if it cost \$10,000 more, 36% were undecided, and 19% said they would not pay more for an ENERGY STAR® -certified home. When the price difference is \$15,000, the proportion saying they would buy an ENERGY STAR®-certified home drops to 42%, with 37% undecided, and 21% disagreeing.

Table 25: Perceived Value (\$) of ENERGY STAR® for Home

Perceived Value (\$) of ENERGY STAR® for Home	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
\$5,000 more than a home that isn't ENERGY STAR-certified	12%	38%	33%	12%	5%
\$10,000 more than a home that isn't ENERGY STAR-certified	9%	35%	36%	12%	7%
\$15,000 more than a home that isn't ENERGY STAR-certified	7%	35%	37%	15%	6%

Base: n=3,400; all respondents

Q13. To what extent do you agree or disagree with the following statements: I would purchase an ENERGY STAR-certified home even if it cost, on average, [RANDOMIZE \$5,000 / \$10,000 / \$15,000] more than a home that isn't ENERGY STAR-certified.

Canadians' willingness to pay a price premium for an ENERGY STAR®-certified home has declined modestly since 2016.⁵

Table 26: Perceived Value (\$) of ENERGY STAR® for Home Over Time

Perceived Value (\$) of ENERGY STAR® for Home over Time	% agreeing (scores of 4-5)	
	2018	2016
\$5,000 more than a home that isn't ENERGY STAR-certified	50%	57%
\$10,000 more than a home that isn't ENERGY STAR-certified	44%	47%
\$15,000 more than a home that isn't ENERGY STAR-certified	42%	43%

All potential features of an ENERGY STAR®-certified home resonate

All potential ENERGY STAR®-certified home features would resonate with a majority of Canadians if they were in the market for a new home. Specifically, at least three-quarters judged each feature to be important if they were in the market for a new home, and each feature was more likely to be judged very important than moderately important.

Leading the way were efficient heating and cooling (86%), higher insulation levels (84%), and high performing window and doors (83%). In each of these cases, a majority of respondents rated each of these features as very important. This was followed by ENERGY STAR®-certified products, such as lighting, appliances, or air conditioners (78%), additional air-sealing (77%), and a whole-home ventilation system (76%).

⁵ Once again, interpretations of comparisons over time should keep in mind the different methodologies—online data collection in 2018 versus telephone data collection in previous years.

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Table 27: Importance of ENGERY STAR®-certified Home Features

Importance of ENGERY STAR®-certified Home Features						
	Very important	Somewhat important	Neutral	Not very important	Not at all important	Don't Know
Efficient heating and cooling	66%	20%	11%	1%	1%	2%
Higher insulation levels	59%	25%	13%	1%	1%	2%
High performing window and doors	59%	24%	13%	1%	1%	2%
ENERGY STAR-certified products	45%	33%	16%	2%	1%	2%
Additional air-sealing	44%	33%	17%	2%	1%	3%
A whole-home ventilation system	44%	32%	18%	2%	1%	3%

Base: n=3,400; all respondents

Q14. If you were in the market for a new home, how important would these ENERGY STAR-certified home features be to you?

Saving money—top reason for buying ENERGY STAR®-certified home

When asked about potential reasons to purchase an ENERGY STAR®-certified home product, saving money on one's energy bill led the way. It was considered important by 88% of respondents (60% describing it as very important). This was followed by having a more comfortable home to live in in terms of balanced temperatures and improved air quality (83%), helping protect the environment (79%) and benefitting from a financial incentive, rebate, or tax incentive (78%). Most of those who did not consider these reasons important rated them as neutral as opposed to unimportant.

Table 28: Importance of Different Reasons to Buy an ENERGY STAR®-Certified Home

Importance of Different Reasons to Buy an ENERGY STAR®-Certified Home					
	Very important	Moderately important	Neutral	Not very important	Not at all important
Saving money on your energy bill	60%	28%	10%	1%	1%
Having a more comfortable home to live in	46%	37%	15%	1%	1%
Helping to protect the environment	40%	39%	17%	2%	2%
Benefiting from a financial incentive, rebate or tax incentive	36%	42%	19%	2%	1%

Base: n=3,400; all respondents

Q22. There are a number of reasons why someone *might* want to buy an ENERGY STAR-certified home. How important are each of the following reasons to you personally?

Table 29: Importance of Different Reasons to Buy an ENERGY STAR®-Certified Home over Time

Perceptions have changed little since 2016.

Importance of Different Reasons to Buy an ENERGY STAR®-Certified Home Over Time		
	% saying it is somewhat or very important	
	2018	2016
Saving money on your energy bill	88%	89%
Having a more comfortable home to live in	83%	85%
Helping to protect the environment	79%	82%

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Benefiting from a financial incentive, rebate or tax incentive	78%	75%
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Asked in an open-ended manner if there are any **other** benefits to owning an ENERGY STAR®-certified home, 80% of respondents said they did not know. Benefits that were identified were mentioned by small numbers (5% or less) and are listed in the accompanying graph.

Table 30: Importance of Other Reasons to Buy an ENERGY STAR®-Certified Home

Influence of ENERGY STAR® Financial Incentive	
	%
Cost savings/ save money/ lower energy costs	5%
Environmentally-friendly/ clean environment	3%
Higher resale value	3%
Confidence in the product/ high quality	2%
Energy efficiency	2%
Comfortable/ well-insulated	1%
Peace of mind	1%
Good (unspecified)	1%
Long-term cost savings	1%
Health benefits/ better air quality	1%
Efficiency/ savings (general)	1%
Doing the right thing	0%
Other	2%
Nothing	2%
Don't Know	80%

Base: n=3,400; all respondents

Q23. Are there any other benefits of owning an ENERGY STAR-certified home? [multiple responses accepted-OPEN-ENDED QUESTION]

Few own an ENERGY STAR®-certified home

Few respondents (6%) said they own an ENERGY STAR®-certified home. Among those who do (n=188), 80% said it has efficient heating and cooling equipment, just over three-quarters said it is energy efficient and has efficient windows (77% each), and 59% said it has a heat recovery ventilator.

Table 31: Proportion of ENERGY STAR®-Certified Homes with the Various Features

Proportion of ENERGY STAR®-Certified Homes with the Various Features			
	Yes	No	Not Sure
Efficient heating and cooling	80%	17%	3%
Energy-efficient	77%	18%	6%
Efficient windows	77%	20%	4%
Heat recovery ventilator	59%	32%	9%

Base: n=188; those who own an ENERGY STAR-certified home

Q25. Which, if any, of the following apply to your ENERGY STAR-certified home?

ENERGY STAR®-certified home owners see numerous benefits

Nearly three-quarters (72%) of respondents who said they own an ENERGY STAR®-certified home described it as warmer in the winter. Just over half described their home as having good indoor quality air (53%) and being cooler in the summer (52%), while almost half described their home as having balanced temperatures throughout and quieter (49% each). Few (4%) said their ENERGY STAR®-certified home as having none of these.

Table 32: Benefits of an ENGERY STAR®-Certified Home

Benefits of an ENGERY STAR®-Certified Home	
	%
My home is warmer in the winter	72%
It has good indoor air quality	53%
My home is cooler in the summer	52%
Temperatures are balanced throughout the home	49%
It's quieter	49%
None of the above	4%

Base: n=188; those who own an ENERGY STAR-certified home
 Q26. Which of the following apply to your ENERGY STAR-certified home? [multiple responses accepted]

B. EnerGuide Labelling Program

This section provides insight into respondents' level of awareness of the EnerGuide performance rating and labelling program, their perceptions and understanding of the brand, and the influence it has on their consumer behaviour.

1. Brand Awareness

One in five Canadians aware of EnerGuide label on an unaided basis

Twenty-one percent of respondents said they had heard, seen or read some about the EnerGuide Label. A majority (61%) said they were unaware and 18% did not know. Unaided awareness is down ten percentage points since it was last measured in 2010, and it is now at the lowest level it has been in over a decade.⁶

Table 33: Awareness of EnerGuide Label Unaided Basis Over Time

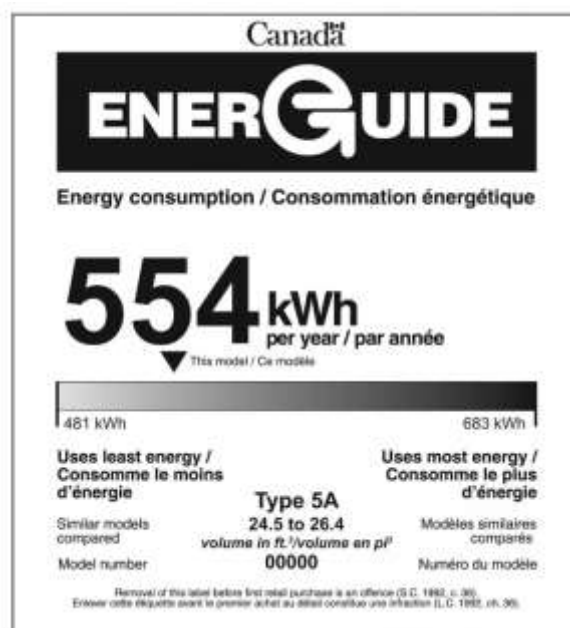
Awareness of EnerGuide Label Unaided Basis Over Time					
	2018	2016	2010	2007	2006
Aware	21%	31%	41%	42%	41%
Not aware	61%	66%	58%	56%	58%
Don't Know	18%	3%	1%	2%	1%

Base for 2018: n=3,400; all respondents

Q27. Have you heard, seen or read anything about the *EnerGuide Label*?

Aided awareness of the EnerGuide Label is higher than unaided awareness

When respondents were shown a picture of the EnerGuide label, nearly two-thirds (65%) said they recalled seeing the label.



⁶ A reminder to readers: comparisons over time should keep in mind the different methodologies—online data collection in 2018 versus telephone data collection in previous years.

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Aided awareness is significantly higher this year, after remaining consistent for a decade. Comparisons over time should keep in mind the different methodologies. In previous years, a description of the EnerGuide Label was read to respondents; this year, an image of the label was presented to respondents.

Table 34: Awareness of EnerGuide Label Aided Basis Over Time

Awareness of EnerGuide Label Aided Basis Over Time					
	2018	2016	2010	2007	2006
Aware	65%	50%	52%	54%	55%
Not aware	27%	48%	47%	45%	44%
Don't Know	8%	2%	1%	1%	1%

Base for 2018: n=3,400; all respondents
Q28. Do you recall seeing this label?

Refrigerators/freezers, washer/dryers—top sources of awareness of EnerGuide

Respondents aware of the EnerGuide Label (n=2,157) were most likely to recall seeing the Label on refrigerators or freezers (64%), and clothes washers or dryers (60%). Nearly half said they recalled seeing a label on a range (49%) or dishwasher (46%). This was followed at a distance by a label on room air conditioners (22%), brochures for heating and cooling equipment (17%), in store displays (14%), a label on an electronic panel in homes and brochures for gas fireplaces (8% each), the Internet (7%), a magazine or newspaper (6%), a label on a new car (4%), and social media (2%).

Table 35: Source of Awareness of EnerGuide Label

Source of Awareness of EnerGuide Label	
	%
Label shown on refrigerators or freezers	64%
Label on clothes washers or dryers	60%
Label on ranges (stoves)	49%
Label on dishwashers	46%
Label on room air conditioners	22%
Brochures for heating and cooling equipment	17%
In-store displays	14%
Label on electric panel in homes	8%
Brochures for gas fireplaces	8%
On the Internet	7%
In a magazine or newspapers	6%
Label on new cars	4%
On social media	2%
Other	1%
I can't recall	5%

Base: n=2,157; those aware of the EnerGuide label
Q31. Where do you recall having seen an EnerGuide label?

This is consistent with survey data from previous years where refrigerators, followed by washers or dryers have been the sources mentioned by the single greatest proportion of the respondents.

2. Understanding of the Brand

Most see EnerGuide Label as showing appliance energy use

Eight in 10 respondents (81%) aware of the EnerGuide Label (n=2,257) believe that the label is a means for demonstrating the energy use of appliances. This is followed at a distance by the perception that it meant they were able to compare the energy consumption of one product to another (45%), that it denotes that an appliance or product is energy-efficient (44%) or that it means energy saving (40%). One-third said that the label meant cost savings to them, while almost as many (31%) thought it was a seal of approval. Almost one-in-five (18%) associated it with electrical safety. Few (2%) said that the label meant nothing to them.

Table 36: Understanding of the EnerGuide Label

Understanding of the EnerGuide Label	
	%
Shows energy use of the appliance	81%
Helps compare energy consumption of products	45%
Appliance or product is energy-efficient	44%
To save energy	40%
Cost saving	33%
Seal of approval / CSA approved	31%
Electrical safety	18%
Other	0%
Nothing / doesn't mean anything to	2%
Don't Know / Refused	3%

Base: n=2,257; those aware of the EnerGuide label
Q29. What does the EnerGuide label mean to you? (multiple responses accepted)

Respondents for whom the EnerGuide Label means several things (n=1,577) were asked which of those things reflects **most** what it means to them. In response, they were most likely to say that it is a means for demonstrating the energy use of appliances (43%). This was followed at a distance by the impressions that it denotes that an appliance or product is energy-efficient or helps compare the energy consumption of one product to another (19% each).

Table 37: Best Understanding of the EnerGuide Label

Best Understanding of the EnerGuide Label	
	%
Shows energy use of the appliance	43%
Appliance or product is energy-efficient	19%
Helps compare energy consumption of products	19%
To save energy	7%
Cost saving	6%
Seal of approval / CSA approved	5%
Electrical safety	2%

Base: n=1,577; those with multiple responses to Q29
Q30. Which of these most reflects what the EnerGuide label mean to you?

Smaller proportions indicated that it means energy saving (7%), cost savings (6%), a seal of approval (5%), and electrical safety (2%).

3. Purchasing Habits

Variety of consumer goods purchased in the last year

In the last 12 months, Canadians reported purchasing a variety of consumer goods. This included new cars (14%), refrigerators or freezers (13%), heating or cooling equipment or clothes washer or dryer (12% each), a dishwasher or room air conditioner (10% each), a range or stove (9%), a new home (5%), and a gas fireplace (4%).

Table 38: Home Products Purchased or Shopped for in the Last 12 Months

Home Products Purchased or Shopped for in the Last 12 Months			
	Purchased	Shopped for but not purchased	Neither
New cars	14%	14%	72%
Refrigerators or freezers	13%	11%	76%
Heating or cooling equipment	12%	9%	79%
Clothes washers or dryers	12%	10%	77%
Dishwashers	10%	9%	80%
Room air conditioners	10%	10%	80%
Ranges	9%	10%	81%
New homes	5%	11%	84%
Gas fireplace	4%	7%	89%

Base: n=3,400; all respondents

Q32. Have you purchased or shopped for one of these products in the last 12 months?

Purchasing habits are similar to those reported in 2016, when new cars led the way at 18%, followed by refrigerators or freezers (17%), heating or cooling equipment (15%), and clothes washers or dryers (12%).

Most EnerGuide aware consumers were influenced by EnerGuide Label

With one exception, a majority of respondents who purchased one of a list of consumer products, said they were influenced at least somewhat by the EnerGuide Label. The EnerGuide Label was most likely to influence those who purchased a gas fireplace and least likely to influence those who purchased a new car in the last year. In the case of a new car, fewer than half said they were influenced at least somewhat by the EnerGuide Label (39%).

Table 39: Influence of EnerGuide Label on Purchase

Influence of EnerGuide Label on Purchase					
	Very much	Somewhat	Slightly	Not at all	Not sure
A gas fireplace	37%	37%	15%	12%	--
A dishwasher	37%	32%	17%	10%	3%
A clothes washer or dryer	44%	26%	15%	12%	2%
A refrigerator or freezer	40%	30%	14%	12%	4%
A range	39%	29%	15%	14%	2%
A room air conditioner	34%	30%	18%	15%	4%

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Heating or cooling equipment	37%	31%	13%	12%	6%
A new home	29%	25%	18%	19%	9%
A new car	17%	22%	15%	39%	7%

Base: n=118-476

Q33. How much did the EnerGuide label influence your decision to purchase [INSERT PRODUCT FROM Q32]? Would you say...?

With just a few exceptions, there has been an increase in the proportion of respondents saying their purchase was very much influenced by the EnerGuide Label. Once again, when interpreting comparisons over time, keep in mind the different methodologies—online data collection in 2018 versus telephone data collection in previous years.

Table 40: Influence of EnerGuide Label on Purchase Over Time

Influence of EnerGuide Label on Purchase – Over Time		
	% saying very much	
	2018	2016
A gas fireplace	37%	41%
A dishwasher	37%	30%
A clothes washer or dryer	44%	34%
A refrigerator or freezer	40%	28%
A range	39%	25%
A room air conditioner	34%	44%
Heating or cooling equipment	37%	29%
A new home	29%	23%
A new car	17%	24%

C. Significant Differences by Socio-Demographic Segment

1. Awareness

ENERGY STAR®

Unaided awareness of ENERGY STAR® was higher among residents of Quebec (59%), Ontario (51%), Saskatchewan (51%), Prince Edward Island (54%), and British Columbia (47%).

Table 41: Unaided Awareness of ENERGY STAR® by Region

Unaided Awareness of ENERGY STAR® by Region			
	Yes	No	Don't Know/ Not sure
Newfoundland and Labrador	49%	35%	16%
P.E.I.	54%	31%	15%
Nova Scotia	39%	46%	15%
New Brunswick	42%	43%	15%
Quebec	59%	27%	13%
Ontario	51%	37%	12%
Manitoba	37%	49%	15%
Saskatchewan	51%	31%	18%
Alberta	40%	42%	18%
British Columbia	47%	37%	15%

When the focus is on age, Canadians under 25 years were the least likely to recall anything about ENERGY STAR® (40%) and those 25-34 and 34-54 years of age were the most likely to claim unaided awareness of ENERGY STAR® (54%). The likelihood of being aware of ENERGY STAR® increased with education, from 44% of respondents with a high school education or less to 58% of university graduates. Like education, awareness increased with household income, from 44% of those earning under \$40,000 annually to 60% of those earning \$100,000 or more last year.

Table 42: Unaided Awareness of ENERGY STAR® by Demographics - 1

Unaided Awareness of ENERGY STAR® by Demographics - 1			
	Yes	No	Don't Know/ Not sure
18-24 year olds	40%	47%	13%
25-34 year olds	54%	37%	9%
35-54 year olds	54%	33%	13%
55 and older	48%	35%	18%
High School or Less	44%	40%	16%
University below a degree/ college	48%	37%	15%
University	58%	31%	10%
Under \$40K	44%	41%	15%
\$40K to under \$80K	50%	36%	14%
\$80K to under \$100K	57%	31%	12%
\$100K or more	60%	29%	12%

Home ownership and having children at home were also predictors of awareness—specifically, respondents who own their own home or who have children living in their home were more likely to be aware of ENERGY STAR® on an unaided basis. Conversely, renters and those who do not have children at home were less apt to heard, read or seen anything

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about the brand.

Table 43: Unaided Awareness of ENERGY STAR® by Demographics - 2

Unaided Awareness of ENERGY STAR® by Demographics - 2			
	Yes	No	Don't Know/ Not sure
Own	56%	31%	13%
Rent	43%	42%	15%
Other	35%	49%	16%
Have Children in home	58%	31%	12%
Do not have Children in home	48%	38%	14%

Turning to aided awareness, respondents in Nova Scotia were less likely to recall the ENERGY STAR symbol. Conversely, aided awareness was higher in Quebec, Ontario and Manitoba.

Table 44: Aided Awareness of ENERGY STAR® by Region

Aided Awareness of ENERGY STAR® by Region			
	Yes	No	Don't Know/ Not sure
Newfoundland and Labrador	85%	8%	7%
P.E.I.	82%	11%	6%
Nova Scotia	83%	11%	6%
New Brunswick	84%	13%	4%
Quebec	89%	7%	4%
Ontario	89%	8%	3%
Manitoba	91%	6%	4%
Saskatchewan	89%	11%	--
Alberta	87%	9%	4%
British Columbia	87%	9%	4%

The differences by subgroup follow the same pattern evident for unaided awareness.

Table 45: Aided Awareness of ENERGY STAR® by Demographics

Aided Awareness of ENERGY STAR® by Demographics			
	Yes	No	Don't Know/ Not sure
18-24 year olds	78%	14%	8%
25-34 year olds	91%	8%	1%
35-54 year olds	92%	5%	3%
55 and older	87%	9%	4%
High School or Less	85%	11%	4%
University below a degree/ college	88%	8%	4%
University	92%	6%	3%
Under \$40K	83%	13%	5%
\$40K to under \$80K	90%	6%	4%
\$80K to under \$100K	91%	6%	3%
\$100K or more	94%	5%	2%

ENERGY STAR-certified Home

The likelihood of being aware that homes can also be ENERGY STAR-certified was highest amongst 25-34 year olds (40%). Furthermore, awareness that homes can be ENERGY-STAR certified increased with income, from 26% of those earning under \$40,000 annually to 37% of those earning \$100,000 or more annually. In addition, awareness was higher respondents who have children at home (39% versus 28% of those who do not have children in the home), and those who identify as male (34% versus 28% of those who identify as female).

Table 46: Awareness of ENERGY STAR® Certified homes by Demographics

Awareness of ENERGY STAR® Certified homes by Demographics		
	Yes	No
18-24 year olds	32%	68%
25-34 year olds	40%	60%
35-54 year olds	32%	68%
55 and older	26%	74%
Under \$40K	26%	74%
\$40K to under \$80K	32%	68%
\$80K to under \$100K	36%	64%
\$100K or more	37%	63%

Respondents aware of ENERGY STAR® without prompting were more likely to be aware of ENERGY STAR-certified homes (42% versus 18% of those not aware of ENERGY STAR®).

Financial Incentives

Respondents from Newfoundland and Labrador (44%), Ontario (37%), Alberta (33%), and British Columbia (33%) were the most likely to be aware that financial incentives, rebates, or tax exemptions are offered for the purchase of ENERGY STAR-certified products.

Table 47: Awareness of ENERGY STAR® financial incentives by Region

Awareness of ENERGY STAR® financial incentives by Region		
	Yes	No
Newfoundland and Labrador	44%	56%
P.E.I.	17%	83%
Nova Scotia	25%	75%
New Brunswick	25%	75%
Quebec	23%	77%
Ontario	37%	63%
Manitoba	26%	74%
Saskatchewan	28%	72%
Alberta	33%	67%
British Columbia	33%	67%

As with the other awareness-related measures, those under 25, those with a high school education or less, those earning an annual income of under \$40,000, renters, and those with no children living in the home were least likely to be aware of the financial incentives. Additionally, those aware of ENERGY STAR® (unaided) were more likely to be aware of the financial incentives (42% vs. 19%).

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Table 48: Awareness of ENERGY STAR® financial incentives by Demographics

Aided Awareness of ENERGY STAR® financial incentives by Demographics		
	Yes	No
18-24 year olds	28%	72%
25-34 year olds	34%	66%
35-54 year olds	34%	66%
55 and older	29%	71%
High School or Less	29%	71%
University below a degree/ college	30%	70%
University	36%	64%
Under \$40K	23%	77%
\$40K to under \$80K	34%	66%
\$80K to under \$100K	37%	63%
\$100K or more	38%	62%
Own	38%	62%
Rent	21%	79%
Other	20%	80%
Have Children in home	41%	59%
Do not have Children in home	28%	72%

EnerGuide Label

There were no significant differences in unaided awareness of the EnerGuide Label amongst regions; however, awareness was lowest in Prince Edward Island (16%) and highest in Nova Scotia (25%).

Table 49: Unaided awareness of EnerGuide Label by Region

Unaided Awareness of EnerGuide Label by Region			
	Yes	No	Don't Know/ Not sure
Newfoundland and Labrador	23%	60%	17%
P.E.I.	16%	72%	13%
Nova Scotia	25%	51%	24%
New Brunswick	21%	65%	14%
Quebec	22%	62%	16%
Ontario	20%	62%	18%
Manitoba	17%	67%	15%
Saskatchewan	20%	60%	20%
Alberta	24%	53%	23%
British Columbia	22%	63%	15%

Other demographic differences were similar to those that emerged for ENERGY STAR®. The youngest cohort (19% of respondents under 25 years of age versus 25% of those aged 55+), those with less formal education (19% versus 25% of university graduates), those earning under \$40,000 a year (18% versus 26% of respondents earning \$100,000+ annually), renters (17% versus 25% of homeowners), and women (18% versus 25% men) were less likely to be aware of the EnerGuide Label on an unaided basis.

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Table 50: Unaided awareness of EnerGuide Label by Demographics

Unaided Awareness of EnerGuide Label by Demographics			
	Yes	No	Don't Know/ Not sure
18-24 year olds	19%	69%	12%
25-34 year olds	18%	68%	13%
35-54 year olds	20%	63%	17%
55 and older	25%	54%	21%
High School or Less	19%	63%	18%
University below a degree/ college	20%	61%	19%
University	25%	60%	15%
Under \$40K	18%	66%	16%
\$40K to under \$80K	22%	60%	18%
\$80K to under \$100K	22%	60%	18%
\$100K or more	26%	59%	15%
Own	25%	57%	18%
Rent	17%	68%	16%
Other	10%	75%	16%
Male	25%	60%	15%
Female	18%	62%	20%
Non-binary	11%	89%	--
Have Children in home	25%	60%	15%
Do not have Children in home	20%	62%	18%

Aided awareness was higher in Newfoundland and Labrador than elsewhere in the country.

Table 51: Aided awareness of EnerGuide Label by Region

Aided Awareness of EnerGuide Label by Region			
	Yes	No	Don't Know/ Not sure
Newfoundland and Labrador	78%	14%	8%
P.E.I.	71%	23%	5%
Nova Scotia	71%	19%	9%
New Brunswick	73%	20%	7%
Quebec	62%	30%	8%
Ontario	65%	29%	7%
Manitoba	63%	28%	10%
Saskatchewan	67%	24%	9%
Alberta	68%	24%	8%
British Columbia	64%	26%	9%

Respondents aware of ENERGY STAR® (unaided and aided) were more likely to also be aware of EnerGuide (77% of unaided and 70% of aided).

2. Attitudes

ENERGY STAR®-certified homes

Those with annual household incomes of \$100,000 or more and university graduates were more likely to feel that an ENERGY STAR®-certified home offers better value than homes without the certification and were more likely to agree to pay a premium (of \$15,000 more) on a certified house than a similar home without certification.

Those aware of ENERGY STAR® (unaided and aided) were also more likely to agree that ENERGY STAR®-certified homes offer a better value (75% of unaided with scores of 1 to 2 and 71% of aided with scores of 1 to 2).

3. Purchasing Habits

Influence of ENERGY STAR®

Those with university level education were more likely to be influenced by ENERGY STAR® when shopping. Additionally, those with unaided awareness of the EnerGuide Label were more likely to say they would be influenced by ENERGY STAR® when shopping.

Influence of Financial Incentives

Those from Quebec were more likely to say they would be unlikely to some degree to have purchased the ENERGY STAR® -labelled product(s) even if the financial incentives had not been available (30% with scores of 3 or 4).

Influence of EnerGuide Label

Those who own houses (35%) and those who have children in their homes (43%) were most likely to be influenced by the EnerGuide Label while shopping.

D. Regional Comparisons Over Time

A fuller discussion of survey differences by socio-demographics can be found in the previous section. What follows below are tables comparing the 2018 results by region for key brand awareness measures to those of the last wave of this research, which was conducted in 2016.

Table 52: Unaided Awareness of ENERGY STAR® by Region – 2018 vs. 2016

Unaided Awareness of ENERGY STAR® by Region		
	2018	2016
Atlantic Canada	43%	34%
Quebec	59%	50%
Ontario	51%	49%
Manitoba/Saskatchewan	43%	44%
Alberta	40%	39%
British Columbia	47%	54%

Table 53: Aided Awareness of ENERGY STAR® by Region – 2018 vs. 2016

Aided Awareness of ENERGY STAR® by Region		
	2018	2016
Atlantic Canada	84%	85%
Quebec	89%	81%
Ontario	89%	85%
Manitoba/Saskatchewan	90%	82%
Alberta	87%	76%
British Columbia	87%	83%

Table 54: Unaided awareness of EnerGuide Label by Region – 2018 vs. 2016

Unaided Awareness of EnerGuide Label⁷ by Region		
	2018	2016
Atlantic Canada	23%	34%
Quebec	22%	22%
Ontario	20%	31%
Manitoba/Saskatchewan	18%	31%
Alberta	24%	40%
British Columbia	22%	34%

Table 55: Aided awareness of EnerGuide Label by Region – 2018 vs. 2016

Aided Awareness of EnerGuide Label by Region		
	2018	2016
Atlantic Canada	73%	54%
Quebec	62%	42%
Ontario	65%	52%
Manitoba/Saskatchewan	65%	46%
Alberta	68%	54%
British Columbia	64%	53%

⁷ When comparing EnerGuide awareness over time by region, caution should be exercised interpreting changes due to the different methods of data collection—in 2016 this data was collected by telephone and in 2018 it was collected online.

E. Advertising Campaign Testing

This section reports on awareness of an ENERGY STAR® advertising campaign which ran in Alberta, New Brunswick, and Nova Scotia during late fall 2018. Consequently, questions were asked only of respondents from those provinces (n=755). The following ads were presented:



Unaided awareness of ad campaign

In all, 13% of respondents in Alberta, New Brunswick, and Nova Scotia recalled having seen, heard, or read any advertising about ENERGY STAR® over the last few weeks preceding the research. Awareness was highest in Alberta (15%).

Among respondents aware of the campaign (n=71), a majority were unable to remember anything about it. Those who did remember something were most likely to recall that it dealt with energy efficiency (21%). Smaller numbers recalled it dealing with environmental friendliness (7%) and saving money (4%). Approximately one in 10 provided some description of the ad and 4% recalled the medium. Caution should be exercised when interpreting these results due to the small sample size.

Table 56: Recall of Advertising about ENERGY STAR

Recall of Advertising about ENERGY STAR				
	Overall	Nova Scotia n=200	New Brunswick n=200	Alberta n=355
Aware	13%	6%	7%	15%
Unaware	87%	94%	93%	85%

Base: n=755; all respondents in Nova Scotia, New Brunswick and Alberta
AC1. Over the past few weeks, have you seen, heard or read any advertising about ENERGY STAR Canada?

Aided awareness of ad campaign

Respondents in the three provinces in which the ad campaign took place were then shown images of two ads that recently appeared on various media and asked if they had seen either of them. Recall of either ad was relatively limited, but slightly higher for ad two (Light Moment) (17%) than ad one (Save Money) (13%).

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Table 57: Aided Awareness of ENERGY STAR Advertisement 1

Aided Awareness of ENERGY STAR Advertisement 1				
	Overall	Nova Scotia n=200	New Brunswick n=200	Alberta n=355
Aware	13%	10%	10%	14%
Unaware	87%	90%	90%	86%

Base: n=755; all respondents in Nova Scotia, New Brunswick and Alberta
AC3_1. Over the past few weeks, have you seen this ad?

Table 58: Aided Awareness of ENERGY STAR Advertisement 2

Aided Awareness of ENERGY STAR Advertisement 2				
	Overall	Nova Scotia n=200	New Brunswick n=200	Alberta n=355
Aware	17%	15%	12%	19%
Unaware	83%	85%	88%	81%

Base: n=755; all respondents in Nova Scotia, New Brunswick and Alberta
AC3_2. Over the past few weeks, have you seen this ad?

Respondents aware of either ad (n=143) were most likely to recall seeing it on television (52%), followed by a magazine or newspaper (42%). Smaller numbers recall hearing an ad on the radio (15%), seeing it on Facebook (13%), seeing it on the Internet in general (7%) or social media in general (5%), or in a store (3%).

Table 59: Sources of Awareness of ENERGY STAR Advertisements

Sources of Awareness of ENERGY STAR Advertisements				
	Overall	Nova Scotia n=37	New Brunswick n=36	Alberta n=70
Television	52%	46%	58%	52%
Magazine or newspaper	42%	42%	15%	46%
Radio	15%	14%	1%	17%
Facebook	13%	0%	4%	17%
Internet website (general)	7%	6%	12%	7%
Social Media (general)	5%	0%	0%	7%
In-store	3%	4%	4%	2%
Can't recall	13%	15%	18%	12%
Other	3%	6%	8%	1%
Don't Know	1%	0%	0%	2%

Base: n=143; those who saw advertisements in Nova Scotia, New Brunswick and Alberta
AC4. Where have you seen these ads?

Perceived purpose of ad

Those who recalled the ads were most likely to describe the main point they were trying to get across as saving energy (18%). This was followed by buying/using energy-efficient products (14%), helping protect the environment (11%), and saving money and energy efficiency (8% each).

Table 60: Perceived Purpose of ENERGY STAR Advertisements

Perceived Purpose of ENERGY STAR Advertisements				
	Overall	Nova Scotia n=37	New Brunswick n=36	Alberta n=70
Buy/ use energy efficient products	14%	13%	9%	15%
Saving money/ save money with these products	8%	23%	15%	4%
Helps protect the environment	11%	11%	2%	12%
Energy efficiency/ use less energy	8%	3%	18%	8%
Saving energy	18%	21%	21%	18%
Other	7%	3%	2%	8%
Don't Know	34%	26%	33%	36%

Base: n=143; those who saw advertisements in Nova Scotia, New Brunswick and Alberta
AC5. What do you think is the main point these ads are trying to get across?

Impact of Ads

Approximately two-thirds of respondents who recalled the ads indicated that the ads had some impact on them. Asked to express their level of agreement with four statements about the ads, 63% of those aware of them indicated that the ads caught their attention, 67% agreed that the ads were relevant to them, and 62% agreed that the ad provided them with new information. A similar proportion (63%) agreed that the information in the ads was objective. In each case, agreement was more likely to be moderate than strong.

Respondents in Nova Scotia and New Brunswick were more likely than those in Alberta to agree that the ads caught their attention. Respondents in Alberta and Nova Scotia were more likely than those in New Brunswick to agree that the information was objective and provided new information. Caution should be exercised in interpreting these differences given the relatively small sample size (n=143).

Table 61: Agreement with – “These ads caught my attention”

Agreement with – “These ads caught my attention”					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Overall	21%	42%	31%	2%	4%
Nova Scotia n=37	15%	58%	22%	2%	3%
New Brunswick n=36	15%	56%	29%	--	--
Alberta n=70	23%	37%	33%	3%	4%

Base: n=143; those who saw advertisements in Nova Scotia, New Brunswick and Alberta
AC6. Please indicate your level of agreement with the following statements about these ads

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Table 62: Agreement with – “These ads were relevant to me”

Agreement with – “These ads were relevant to me”					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Overall	27%	40%	29%	1%	4%
Nova Scotia n=37	22%	40%	34%	--	3%
New Brunswick n=36	20%	42%	32%	7%	--
Alberta n=70	29%	39%	27%	1%	4%

Table 63: Agreement with – “The information in these ads was objective”

Agreement with – “The information in these ads was objective”					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Overall	19%	44%	31%	3%	3%
Nova Scotia n=37	17%	46%	37%	--	--
New Brunswick n=36	9%	37%	46%	8%	--
Alberta n=70	21%	45%	27%	3%	4%

Table 64: Agreement with – “These ads provided new information”

Agreement with – “These ads provided new information”					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Overall	20%	42%	29%	5%	4%
Nova Scotia n=37	14%	52%	26%	5%	3%
New Brunswick n=36	7%	50%	38%	5%	--
Alberta n=70	23%	39%	28%	6%	4%

Appendix

Research Instrument

Landing page

Language. Please select which language you wish to complete the survey in.

- English/Anglais
- French/*Français*

Introduction page

Thank you for agreeing to take part in this short survey being conducted on behalf of the Government of Canada by *Phoenix Strategic Perspectives Inc.* Click [here](#) if you wish to verify the authenticity of this survey. The survey should take no more than 15 minutes to complete and is voluntary and completely confidential. Please be assured that all opinions will remain anonymous and will not be attributed to you personally in any way. To view our privacy policy, click [here](#).

Click 'Next' to start the survey.

PROGRAMMING NOTES:

a) Click [here](#) if you wish to verify the authenticity of this survey. A new window will open if a respondent selects this. The text will read:

If you have any questions about the survey, please contact Emma Blackburn, *Phoenix Strategic Perspectives Inc.*, at (613) 260-1700 ext. 221 (eblackburn@phoenixspi.ca) or Marceylne Cross, Government of Canada, at 613-762-6311.

b) To view our privacy policy, click [here](#). A new window will open if a respondent selects this. The text will read:

Phoenix Strategic Perspectives Inc. supports and strictly adheres to the industry standards and guidelines for Internet and other types of research.

On January 1, 2004, the Canadian government enacted the Personal Information Protection and Electronic Documents Act (PIPEDA), which protects the privacy and rights of the public while recognizing and supporting legitimate market research practices. Phoenix continuously monitors its security and data management practices to ensure it is in full compliance with the Act. You can learn more about PIPEDA legislation at <http://laws.justice.gc.ca/en/P-8.6/index.html>.

Your personal identifying information (name, e-mail address, etc.) will never be shared with any third party without your express consent. Additionally, your responses are combined with those of other people and are tabulated in the aggregate. Any answers you provide to survey questions will remain entirely confidential.

c) SECTION TITLES SHOULD NOT APPEAR ON SCREEN FOR RESPONDENTS.

d) DO NOT PRESENT QUESTION NUMBERS ON SCREEN FOR RESPONDENTS.

e) ALL QUESTIONS ARE MANDATORY.

Screenener

S1. In what year were you born?

[YYYY]

- Prefer not to answer ASK S1a

S1a. In which of the following age categories do you belong?

- Less than 18 years old TERMINATE
 18 to 24
 25 to 34
 35 to 44
 45 to 54
 55 to 64
 65 or older
 Prefer not to say TERMINATE

TERMINATION MESSAGE:

Thank you very much for your interest in completing this survey. Unfortunately you are not eligible for this survey.

S2. Have you participated in a Government of Canada survey in the last 30 days?

- Yes TERMINATE
 No

S3. Do you, or does anyone in your family or household, work in any of the following areas?

Select all that apply

- Marketing research TERMINATE
 The media (i.e. TV, radio, newspapers)TERMINATE
 Public utilities (i.e. hydro, gas) TERMINATE
 The federal or provincial governmentTERMINATE
 None of these organizations

S4. Are you....?

- Male
 Female
 Other
 Prefer not to answer

S5. Where do you live?

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- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland and Labrador
- Northwest Territories
- Nova Scotia
- Nunavut
- Ontario
- Prince Edward Island
- Quebec
- Saskatchewan
- Yukon Territory

S6. What language do you speak most often at home?

Select all that apply

- English
- French
- Other
- Prefer not to say

I. Awareness

1. Have you heard, read or seen anything about ENERGY STAR?

- Yes
- No
- Don't know / not sure

2. Do you recall seeing this ENERGY STAR symbol?



- Yes
- No
- Don't know / not sure

[IF YES TO Q2, CONTINUE; OTHERWISE SKIP TO STATEMENT BEFORE Q7]

3. Where did you see the ENERGY STAR symbol?

Select all that apply

- As part of advertising about climate change
- From a public utility (hydro, gas, etc.)
- On a T.V., DVD or other audio products
- On major appliances
- In home or on home electrical panel
- In promotional material for residential heating and cooling products
- In promotional material for office equipment
- Displayed in a store on a sign
- Displayed in a brochure
- In a magazine or newspaper
- In a promotional flyer from a retail establishment
- On the Internet
- On social media
- Other (SPECIFY)
- I can't recall [EXCLUSIVE]

4. What does the ENERGY STAR symbol mean to you?

Select all that apply

[RANDOMIZE LIST]

- Energy efficient/ low energy consumption/ saves energy
- Saves money
- Good for the environment/ mentions of green
- Higher quality/made better
- Government backed
- Third-party certified
- Other (SPECIFY)
- Nothing / doesn't mean anything to me [EXCLUSIVE]

5. You indicated that the ENERGY STAR symbol means several things to you. Which of these most reflects what the ENERGY STAR symbol means to you?

[INSERT ITEMS FROM Q4]

II. Attitudes towards ENERGY STAR

[THOSE AWARE OF ENERGY STAR]

6. To what extent do you agree or disagree with each of the following statements about ENERGY STAR?

GRID FORMAT; ROWS:

[RANDOMIZE STATEMENTS]

- a. Buying ENERGY STAR-labelled products makes me feel like I'm helping to protect the environment for future generations.
- b. If I see the ENERGY STAR label, I know I am getting a more efficient product.

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- c. Buying ENERGY STAR-labelled products makes me feel like I'm contributing to society.
- d. ENERGY STAR-labelled products provide me with more benefits than products without the ENERGY STAR label.
- e. ENERGY STAR-labelled products offer better value than products without the label.
- f. Buying ENERGY STAR-labelled products makes me feel like I'm spending extra money for nothing.
- g. I consider myself loyal to ENERGY STAR-labelled products.
- h. I would purchase an ENERGY STAR-labelled product even if it cost [RANDOMIZE: 5%/ 10%/ 15%] *more* than a similar product without the label.
- i. I am confident that products which carry the ENERGY STAR label have been rigorously tested and proven to be energy efficient.

COLUMNS:

Strongly disagree
Disagree
Neutral
Agree
Strongly agree

[THOSE AWARE SKIP TO Q8; ASK Q7 OF THOSE UNAWARE OF ENERGY STAR]

[NEW WINDOW]

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

7. Based on this description of the ENERGY STAR symbol, to what extent do agree or disagree with each of the following statements?

GRID FORMAT; ROWS:

[RANDOMIZE STATEMENTS]

- a. Buying ENERGY STAR-labelled products would make me feel like I'm helping to protect the environment for future generations.
- b. If I see the ENERGY STAR label, I know I would be getting a more efficient product.
- c. Buying ENERGY STAR-labelled products would make me feel like I'm contributing to society.
- d. ENERGY STAR-labelled products would provide me with more benefits than products without the ENERGY STAR label.
- e. ENERGY STAR-labelled products would offer better value than products without the label.
- f. Buying ENERGY STAR-labelled products would make me feel like I'm spending extra money for nothing.

- g. I would purchase an ENERGY STAR-labelled product even if it cost [RANDOMIZE: 5%/ 10%/15%] *more* than a similar product without the label. [ENSURE ROUGHLY EQUAL DISTRIBUTION—APPROXIMATELY 730+ PER OPTION]
- h. I am confident that products which carry the ENERGY STAR label have been rigorously tested and proven to be energy efficient.

COLUMNS:

Strongly disagree
Disagree
Neutral
Agree
Strongly agree

[THOSE UNAWARE OF ENERGY STAR, SKIP TO Q12]

8. Have you ever seen, heard, or read anything about ENERGY STAR Most Efficient?
- Yes
 - No
 - Don't know / not sure

9. Do you recall seeing this symbol?



- Yes
- No
- Don't know / not sure

[IF YES TO Q9, CONTINUE; OTHERWISE SKIP TO Q12]

10. What does ENERGY STAR Most Efficient mean to you?

Select all that apply

- Represent a subset of ENERGY STAR certified products
- Represent the best of the best/Top ENERGY STAR performers
- Technologically advanced/Cutting edge technology
- Higher quality/model better
- Other (specify)
- Nothing/Doesn't mean anything to me

11. You indicated that ENERGY STAR Most Efficient means several things to you. Which of these most reflects what it means to you?

[INSERT ITEMS FROM Q10]

III. ENERGY STAR for Homes

[ALL RESPONDENTS]

12. Are you aware that homes can also be ENERGY STAR-certified?

- Yes
- No

[NEW WINDOW]

The international ENERGY STAR symbol and label is a simple way for consumers to identify an energy-efficient home. The same way some products and appliances feature an ENERGY STAR blue label to signify energy efficiency, new homes may be ENERGY STAR-labelled to demonstrate higher level of energy efficiency. These homes have increased comfort, save you money on energy bills and help reduce GHG emissions.

13. To what extent do you agree or disagree with the following statements?

GRID FORMAT; ROWS:

- a. An ENERGY STAR-certified home would offer better value than a home without this certification.
- b. I would purchase an ENERGY STAR-certified home even if it cost, on average, [RANDOMIZE \$5,000 / \$10,000 / \$15,000] more than a home that isn't ENERGY STAR-certified.

COLUMNS:

Strongly disagree
Disagree
Neutral
Agree
Strongly agree

14. If you were in the market for a new home, how important would these ENERGY STAR-certified home features be to you?

[RANDOMIZE ITEMS]

GRID FORMAT; ROWS:

- a) Higher insulation levels
- b) Efficient heating and cooling
- c) Additional air-sealing
- d) High performing window and doors
- e) A whole-home ventilation system

- f) ENERGY STAR-certified products, such as lighting, appliances, or air conditioners

COLUMNS:

Not at all important
Not very important
Neutral
Somewhat important
Very important
Don't know

IV. Recent Purchases

[ALL RESPONDENTS]

15. Have you purchased or shopped for one of these products in the last 12 months?

[RANDOMIZE ITEMS]

GRID FORMAT; ROWS:

- a. Heating and cooling products like a furnace or air conditioner
- b. Home appliances like a dishwasher or fridge
- c. Lighting products like a light bulb or light fixture
- d. Home electronics like a television or DVD player
- e. Windows or doors
- f. Home office products, such as a computer or printer
- g. A home or residence

COLUMNS:

Purchased
Shopped for but not purchased
Neither purchased nor shopped for

[FOR EACH "YES, PURCHASED" RESPONSE AT Q15 ASK Q16; ELSE SKIP TO Q18]

16. [IF ONE PRODUCT ONLY] To the best of your knowledge, was the [INSERT PRODUCT FROM Q15] you most recently purchased ENERGY STAR-certified?

- Yes
- No
- Don't know / Not sure

CATEGORIES:

- a. Heating or cooling product
- b. Home appliance
- c. Lighting product
- d. Home electronics product
- e. Windows or doors

- f. Home office product
- g. Home or residence

16b. [IF MULTIPLE PRODUCTS] To the best of your knowledge, was the [INSERT PRODUCT FROM Q15] you most recently purchased ENERGY STAR-certified?

GRID FORMAT; ROWS:

- a. Heating or cooling product
- b. Home appliance
- c. Lighting product
- d. Home electronics product
- e. Windows or doors
- f. Home office product
- g. Home or residence

COLUMNS:

Yes

No

Don't know / Not sure

[ASK Q17 FOR EACH "YES" RESPONSE AT Q16 ELSE SKIP TO Q18]

17. [IF ONE PRODUCT ONLY] How much did the ENERGY STAR label influence your decision to purchase an ENERGY STAR-certified [INSERT ENERGY STAR PRODUCT CATEGORY FROM Q15]?

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

CATEGORIES:

- a. Heating or cooling product
- b. Home appliance
- c. Lighting product
- d. Home electronics product
- e. Building materials product
- f. Home office product
- g. Home or residence

17b. [IF MULTIPLE PRODUCTS] How much did the ENERGY STAR label influence your decision to purchase an ENERGY STAR-certified [INSERT ENERGY STAR PRODUCT CATEGORY FROM Q15]?

GRID FORMAT; ROWS:

- a. Heating or cooling product

- b. Home appliance
- c. Lighting product
- d. Home electronics product
- e. Building materials product
- f. Home office product
- g. Home or residence

COLUMNS:

Very much
Somewhat
Slightly
Not at all
Don't know / Not sure

18. Are you aware of any financial incentives, rebates or tax exemptions offered for the purchase of ENERGY STAR certified major appliances, home electronics, office equipment, lighting products, windows and doors, heating or cooling equipment or new homes?

- Yes
- No

[IF YES TO Q18, ASK Q19. OTHERWISE SKIP TO Q21]

19. Have you ever benefited from or taken advantage of financial incentives, rebates or tax exemptions in the purchasing of ENERGY STAR certified major appliances, home electronics, office equipment, lighting products, windows and doors, heating or cooling equipment or new homes?

- Yes
- No
- Don't know / Not sure

[IF YES in Q19, ASK Q20. OTHERWISE SKIP TO Q21]

20. If financial incentives, rebates or tax exemptions had not been available, how likely is it that you would have purchased the ENERGY STAR-labelled product?

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

21. There are many possible reasons to buy an ENERGY STAR-labelled product. How important are each of the following reasons to you personally?

GRID FORMAT; ROWS:
[RANDOMIZE]

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- a. Helping to protect the environment
- b. Saving money on your energy bill
- c. Benefiting from a financial incentive, rebate or tax incentive

COLUMNS:

Not at all important
Not very important
Neutral
Somewhat important
Very important
Don't know

22. There are a number of reasons why someone *might* want to buy an ENERGY STAR-certified home. How important are each of the following reasons to you personally?

GRID FORMAT; ROWS:
[RANDOMIZE]

- a. Helping to protect the environment
- b. Saving money on your energy bill
- c. Benefiting from a financial incentive, rebate or tax incentive
- d. Having a more comfortable home to live in in terms of balanced temperatures and improved air quality.

COLUMNS:

Not at all important
Not very important
Neutral
Moderately important
Very important

23. Are there any other benefits of owning an ENERGY STAR-certified home?

[OPEN-END]

24. Do you own an ENERGY STAR-certified home?

- | | |
|---|-----------|
| <input type="radio"/> Yes | CONTINUE |
| <input type="radio"/> No | GO TO Q27 |
| <input type="radio"/> Don't know / Not sure | GO TO Q27 |

25. Which, if any, of the following apply to your ENERGY STAR-certified home? My home...

GRID FORMAT; ROWS:
[RANDOMIZE]

- ... is an energy-efficient home?
- ... has efficient windows?
- ... has efficient heating and cooling equipment?

... has a heat recovery ventilator?

COLUMNS:

- Yes
- No
- Not sure

26. Which of the following apply to your ENERGY STAR-certified home?

Select all the apply

- My home is warmer in the winter
- My home is cooler in the summer
- It's quieter
- It has good indoor air quality
- Temperatures are balanced throughout the home
- None of the above

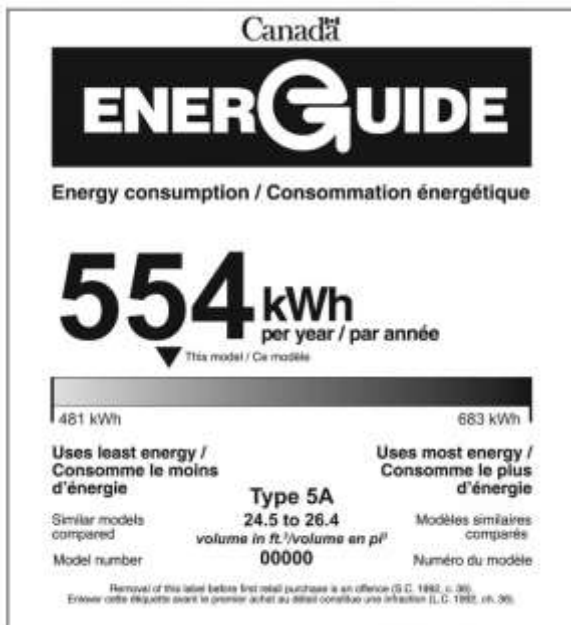
V. EnerGuide

[ALL RESPONDENTS]

27. Have you heard, seen or read anything about the *EnerGuide Label*?

- Yes
- No
- Don't know / Not sure

28. Do you recall seeing this symbol?



- Yes

- No
- Don't know / not sure

[IF "YES" TO Q27 OR Q28 ASK Q29 OTHERWISE SKIP TO Q32]

29. What does the EnerGuide label mean to you?

Select all that apply

- Shows the energy use of the appliance
- Appliance or product is energy-efficient
- Helps compare the energy consumption of one product to another
- Seal of approval / Canadian Standards Association (CSA) approved
- Electrical safety
- Cost saving
- To save energy
- Nothing / doesn't mean anything to me
- Other (SPECIFY)

30. You indicated that the EnerGuide label means several things to you. Which of these most reflects what the EnerGuide label means to you?

[INSERT ITEMS FROM Q29]

31. Where do you recall having seen an EnerGuide label?

Select all that apply

- Brochures for heating and cooling equipment
- Brochures for gas fireplaces
- Label shown on refrigerators or freezers
- Label on ranges (stoves)
- Label on clothes washers or dryers
- Label on dishwashers
- Label on room air conditioners
- Label on new cars
- Label on electric panel in homes
- In-store displays
- In a magazine or newspaper
- On the Internet
- On social media
- Other (SPECIFY)
- I can't recall [EXCLUSIVE]

32. Have you purchased or shopped for one of these products in the last 12 months?

[RANDOMIZE ITEMS]

GRID FORMAT; ROWS:

- a. Heating or cooling equipment
- b. Gas fireplaces
- c. Refrigerators or freezers
- d. Ranges (stoves)
- e. Clothes washers or dryers
- f. Dishwashers
- g. Room air conditioners
- h. New cars
- i. New homes

COLUMNS:

Purchased

Shopped for but not purchased

Neither purchased nor shopped for

[FOR EACH “YES, PURCHASED” RESPONSE AT Q32 ASK Q33 ELSE SKIP TO DEMOGRAPHICS UNLESS FROM NOVA SCOTIA, NEW BRUNSWICK, OR ALBERTA]

33. [IF ONE PRODUCT ONLY] How much did the EnerGuide-label influence your decision to purchase [INSERT PRODUCT FROM Q32]?

- Very much
- Somewhat
- Slightly
- Not at all
- Not sure

CATEGORIES:

- a. Heating or cooling equipment
- b. A gas fireplace
- c. A refrigerator or freezer
- d. A range
- e. A clothes washer or dryer
- f. A dishwasher
- g. A room air conditioner
- h. A new car
- i. A new home

33b. [IF MULTIPLE PRODUCTS] How much did the EnerGuide-label influence your decision to purchase these products?

GRID FORMAT; ROWS:

- a. Heating or cooling equipment
- b. A gas fireplace
- c. A refrigerator or freezer
- d. A range
- e. A clothes washer or dryer

- f. A dishwasher
- g. A room air conditioner
- h. A new car
- i. A new home

COLUMNS:

Very much
Somewhat
Slightly
Not at all
Don't know / Not sure

[GO TO DEMOGRAPHICS UNLESS FROM NOVA SCOTIA, NEW BRUNSWICK, OR ALBERTA]

Advertising Campaign Testing

[ALBERTA, NEW BRUNSWICK, NOVA SCOTIA ONLY]

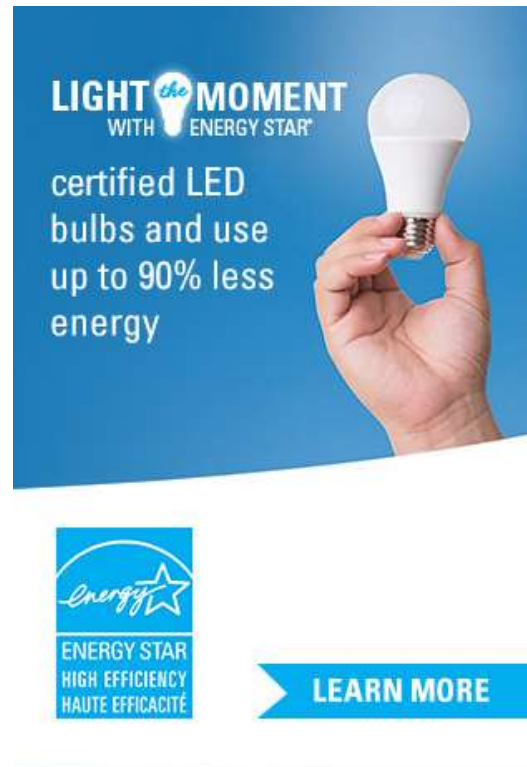
AC1. Over the past few weeks, have you seen, heard or read any advertising about ENERGY STAR Canada?

- Yes CONTINUE
- No SKIP TO PREAMBLE BEFORE QAC3

AC2: What do you remember about this advertising?

[OPEN-END]

Here are two ads that recently appeared on various media.



AC3: Over the past few weeks, have you seen either of these ads?

FOR EACH AD:

- Yes
- No

[IF NO TO BOTH, GO TO DEMOGRAPHICS]

AC4. Where have you seen these ads?

Select all that apply

- Internet website
 - Please specify:
- Television
- Radio
- Magazine or newspaper
- Social media
 - Please specify:
- Other (SPECIFY)
- I can't recall [EXCLUSIVE]

AC5. What do you think is the main point these ads are trying to get across?

[OPEN-END]

AC6. Please indicate your level of agreement with the following statements about these ads.

GRID FORMAT; ROWS:
[RANDOMIZE STATEMENTS]

- a. These ads caught my attention
- b. These ads were relevant to me
- c. The information in these ads was objective
- d. These ads provided new information

COLUMNS:

Strongly disagree
Disagree
Neutral
Agree
Strongly agree

[GO TO DEMOGRAPHICS]

Demographics

The last few questions are for classification purposes only.

34. What is the highest level of formal education that you have completed?

- Grade 8 or less
- Some high school
- High School diploma or equivalent
- Registered Apprenticeship or other trades certificate or diploma
- College, CEGEP or other non-university certificate or diploma
- University certificate or diploma below bachelor's level
- Bachelor's degree
- Post graduate degree above bachelor's level
- Prefer not to say

35. Which of the following categories best describes your total household income?

- Under \$20,000
- \$20,000 to just under \$40,000
- \$40,000 to just under \$60,000
- \$60,000 to just under \$80,000
- \$80,000 to just under \$100,000
- \$100,000 to just under \$150,000
- \$150,000 and above
- Prefer not to say

36. Which of the following categories best describes your current employment status?

- Working full-time, that is, 35 or more hours per week

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- Working part-time, that is, less than 35 hours per week
- Self-employed
- Unemployed, but looking for work
- A student attending school full-time
- Retired
- Not in the workforce [full-time homemaker, unemployed, not looking for work]
- Other
- Prefer not to say

37. Do you currently own or rent your home?

- Own
- Rent
- Other [live at home, live at school, etc.]
- Prefer not to say

38. Do you have any children under the age of 18 currently living in your household?

- Yes
- No
- Prefer not to say

39. Are you the head, or co-head of your household, that is, a person who makes key decisions about spending in your household?

- Yes
- No
- Prefer not to say

40. What are the first three digits of your postal code?

- RECORD: _____
- Prefer not to say

Closing Page

This completes the survey. This survey was conducted on behalf of Natural Resources Canada. On behalf of the Government of Canada, we thank you for taking the time to share your feedback. It is much appreciated.

Tabulated Data

A full set of tabulated data is available under separate cover.