



Natural Resources Canada
Ressources naturelles Canada

ENERGY STAR[®] and EnerGuide Labelling Awareness Survey 2020 Executive Summary

Prepared for Natural Resources Canada

Supplier Name: EKOS Research Associates

Contract Number: 23483-210506/001/CY

Contract Value: \$69,049.10

Award Date: 2020-11-02

Delivery Date: 2021-02-02

Registration Number: POR 053-20

For more information on this report, please contact NRCan at:

nrcan.por-rop.rncan@canada.ca

Ce rapport est aussi disponible en français.

Canada 

ENERGY STAR[®] and EnerGuide Labelling Awareness Survey 2020

Executive Summary

Prepared for Natural Resources Canada
Supplier name: EKOS Research Associates
February 2021

This publication may be reproduced for non-commercial purposes only. Prior written permission must be obtained from Natural Resources Canada. For more information on this report, please contact Natural Resources Canada at:

nrcan.por-rop.nrcan@canada.ca

Catalogue number:

M144-295/2-2020E-PDF

International Standard Book Number (ISBN):

978-0-660-37924-1

EXECUTIVE SUMMARY

Background and Methodology

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.

This research aims to provide insight into Canadian general public awareness, understanding, attitudes and perceptions towards ENERGY STAR and EnerGuide labelling, as well as the potential influences that might affect Canadians' purchase decisions.

The survey targeted Canadians 18 years of age and older, ensuring an appropriate mix of age, gender, official languages, ethnicity, education and income. This study represents the 11th wave of surveying since November 2001.

The research involved an online survey of 3,416 Canadians. The survey was conducted across Canada in both official languages. The field dates for the survey were December 3-20, 2020.

Appendix A contains a detailed description of the methodology used in this study.

Survey Findings

Outlined below are key findings from this study. The remainder of this report describes survey results in more detail. Where possible, results are tracked to previous surveys, however, please note that different methodologies were used in the earlier surveys. The 2018 survey was conducted online; previous surveys were conducted by telephone. Also please note the 2018 survey was conducted with a non-probability online panel whereas this year's survey was conducted with a probability-based online panel, therefore tracking results should be interpreted with some caution.

Energy Consumption and ENERGY STAR

Canadians clearly see the connection between their energy consumption and climate change. Almost four in five (78%) think that household energy consumption definitely or likely contributes to climate change, and only 17% think that household energy consumption does not contribute to climate change.

When asked whether they had heard, read, or seen anything about ENERGY STAR, results suggest that three in four Canadians (73%) are aware of the brand. Awareness is significantly higher than it was in 2018 when 50% were aware of ENERGY STAR.

Not surprisingly, awareness of ENERGY STAR increases when respondents were presented with the ENERGY STAR symbol. A clear majority (92%, up from 88% in 2018) said they recalled seeing the ENERGY STAR symbol. This is the highest level of awareness of the ENERGY STAR symbol since tracking began in 2006.

Respondents aware of ENERGY STAR were asked where they recalled seeing the ENERGY STAR symbol. As in previous years, appliances were mentioned most often (88%). No other product or advertisement is mentioned as a source of awareness of ENERGY STAR by more than four in ten of these respondents.

Respondents who recalled seeing the ENERGY STAR symbol were also asked what the symbol means to them. As in previous years, results reveal that most Canadians associate the ENERGY STAR symbol with energy efficiency: almost nine in ten (88%) relate it with low energy consumption.

Findings also reveal that those aware of ENERGY STAR hold favourable views of ENERGY STAR certified products. Three in four (75%) agree that if they see the ENERGY STAR symbol they know they will be getting a more efficient product. Two-thirds (65%) feel confident that products which carry the ENERGY STAR symbol have been rigorously tested and proven to be energy efficient, and a similar proportion (62%) agree that buying ENERGY STAR certified products would make them feel like they are helping to protect the environment for future generations. Only one in ten (10%) believe that buying ENERGY STAR certified products makes them feel like they are spending extra money for nothing. Tracking suggests a decrease in agreement with many of these statements since 2018; back to levels seen in earlier years.

Results further indicate a general willingness to pay extra for ENERGY STAR certified products. Half (51%) would purchase an ENERGY STAR certified product even if it cost 5% more than a similar product without the label. Forty-five percent would be willing to pay 10% more, and almost four in ten (38%) would be willing to pay 15% more for an ENERGY STAR product. Canadians'

willingness to pay a premium for ENERGY STAR certified products is down from 2018 and back to 2016 levels.

Respondents that were not aware of the ENERGY STAR symbol were given a description of the symbol and asked a series of attitudinal statements about ENERGY STAR certified products (similar to the ones asked of those aware of the symbol).

Findings reveal generally favourable views of ENERGY STAR certified products, even among those unaware of the symbol. Almost six in ten of these respondents (58%) agree that buying ENERGY STAR certified products would make them feel like they are helping to protect the environment. More than half (53%) think that if they see the ENERGY STAR symbol they know they would be getting a more efficient product, and a similar proportion (52%) would feel like they are contributing to society when buying ENERGY STAR certified products. The plurality of these respondents (36%) disagree that buying ENERGY STAR certified products would make them feel like they are spending extra money for nothing.

Results also reveal a general willingness to pay extra for ENERGY STAR certified products, even among those unaware of the symbol. Four in ten (41%) would be willing to pay 5% more for an ENERGY STAR certified product, and roughly the same proportion (39%) would pay 10% more. One in three (33%) would be willing to pay 15% more for an ENERGY STAR certified product.

Turning to the ENERGY STAR Most Efficient designation, fewer than one in five Canadians (18%) said they had seen, heard or read something about this designation. Interestingly, when shown the ENERGY STAR Most Efficient symbol, even fewer (12%) said they recalled seeing this symbol.

As with the ENERGY STAR symbol, respondents who recalled seeing ENERGY STAR Most Efficient symbol were asked what the symbol means to them. Half of these respondents (49%) said it represents the best of the best/top ENERGY STAR performers. Four in ten (40%) said it represents a subset of ENERGY STAR certified products, and three in ten (28%) said it represents cutting edge technology.

Purchasing Decisions

Respondents were asked whether they had purchased a number of electrical products in the past 12 months. Findings reveal that among the products examined, lighting products are purchased most often (65%). Three in ten or fewer indicated they had purchased any of the other electrical products listed.

Results further suggest that many of the electrical products Canadians purchase are ENERGY STAR certified. More than two-thirds (68%) indicate that the home appliances purchased were ENERGY STAR certified. Six in ten (60%) who purchased a heating or cooling product in the last

year indicated that the product was certified, and a similar proportion (58%) indicated their water heater was ENERGY STAR certified. Tracking reveals a drop in the proportion of Canadians who purchase ENERGY STAR certified products from 2018 (back to 2016 levels).

When asked whether the ENERGY STAR symbol influenced their decision to purchase an ENERGY STAR certified product, results indicate that the ENERGY STAR symbol did influence the purchasing decision of a majority of these respondents across virtually all the products examined. Tracking suggests a decrease in the influence of the ENERGY STAR symbol when purchasing products, however, as noted earlier, given the different methodologies employed, tracking results should be interpreted with some caution.

When asked to rate the likelihood of purchasing products or services from a company that makes efforts to save energy and help the environment, results reveal that a majority of Canadians (64%) say they would be more likely to purchase products from a company that helps the environment through energy savings.

ENERGY STAR for Homes

When asked about their awareness of ENERGY STAR certification for homes, one in four Canadians (26%) say they are aware of this certification. Awareness is down somewhat from 2018 when 31% said they were aware of ENERGY STAR for homes.

Despite limited awareness of ENERGY STAR certification for homes, when provided with a description of the benefits of an ENERGY STAR certified home, a clear majority (71%) agree that an ENERGY STAR certified home would offer better value than a home without the certification.

Findings further reveal that a majority of Canadians (63%) say they would purchase an ENERGY STAR certified home even if it cost \$5,000 more than a home that is not certified. However, this proportion drops to 37% when increasing the cost by \$15,000.

Respondents were asked to rate the importance of ENERGY STAR certified home features if they were in the market for a new home. Results indicate that Canadians place a great deal of importance on all of these features. Roughly nine in ten (88%) assign a high degree of importance to efficient heating and cooling, and a similar proportion believes higher insulation levels, and high performing windows and doors are important (87% each). A further three in four assign a high degree of importance to ENERGY STAR certified products (such as lighting and appliances), and additional air-sealing (74% each). The importance of ENERGY STAR certified home features increases with age, educational attainment and income.

EnerGuide

Canadians were asked about their awareness of the EnerGuide Labelling Program. Results suggest limited awareness of the program: fewer than four in ten say they are aware of the program (38%), while half (50%) say they are not aware. Tracking reveals a 17-point increase in unaided awareness of the EnerGuide label since 2018; back to levels seen in previous years.

Respondents were also shown a picture of the EnerGuide label and asked whether they recalled seeing it. Despite limited (unaided) awareness of the EnerGuide label, most Canadians have seen the EnerGuide symbol. More than three in four (77%) recall seeing the symbol, and only one in five (19%) don't recall seeing it.

Respondents aware of the EnerGuide label were asked where they had seen the symbol. As in previous years, the label is most likely to be seen on household appliances: 69% indicated refrigerators or freezers, and 62% indicated clothes washers or dryers.

Respondents aware of the EnerGuide label were asked what the label means to them. Results suggest that Canadians generally associate the label with the energy consumption of the appliance. Three in four (74%) indicate that the label shows the energy use of the appliance, and six in ten (60%) think that the label helps compare energy consumption of one product to another.

Respondents were provided a list of products and asked whether they had purchased any of them in the last 12 months. Cars and refrigerators/freezers (13% each) were identified most often followed by heating/cooling equipment (12%), and clothes washers/dryers and dishwashers (10% each).

Respondents that had purchased these products were asked whether they were influenced by the EnerGuide label when making the purchase. Results reveal that Canadians generally feel influenced by the EnerGuide label when purchasing products: about half of respondents who purchased one of these products indicated that they were persuaded to some extent by the label (with the exception of purchasing a new home or a new car).

Respondents were also asked whether a home label indicating better energy efficiency would influence their decision to buy a house. Results reveal that a majority of Canadians (51%) consider the label important, and only one in five (20%) indicate it would have no influence.

When asked to rate the extent to which they would consider obtaining an EnerGuide home evaluation, results reveal mixed views on the issue: four in ten (42%) say they would get an EnerGuide home evaluation, while one in five (20%) say they would not consider doing this.