

ENERGY STAR® and EnerGuide Labelling Awareness Survey 2023: Executive Summary

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

nrcan.por-rop.mcan@canada.ca

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KEY FINDINGS

Key Findings: Overview

- Awareness of ENERGY STAR and the EnerGuide label – both unaided and aided¹ – has declined significantly since 2020.
- Despite this overall decline in awareness, a greater proportion of people, aware of ENERGY STAR, reported being aware of the ENERGY STAR Most Efficient designation – both aided and unaided – over the same period.
- Those who are aware of the ENERGY STAR brand hold increasingly positive attitudes towards it, though are no more or less inclined to pay extra for it.
- The ENERGY STAR symbol is generally influencing the purchasing decision more than it did in 2020 and the incidence of those who are purchasing ENERGY STAR certified products has rebounded somewhat, after hitting lows across most metrics in 2020.
- There is mounting evidence that the EnerGuide label is exercising some degree of influence over large purchases (i.e., houses or cars) and the purchase of household products (i.e., household appliances or other large household items).
- There is a growing belief that an ENERGY STAR certified home offers better value than a home that is not ENERGY STAR certified.
- There is increased awareness of the fact that ENERGY STAR certification is available for buildings and industrial facilities.

Detailed Key Findings

1. AWARENESS, UNDERSTANDING, AND ATTITUDES TOWARDS ENERGY STAR

Awareness of ENERGY STAR, both aided and unaided, is down relative to 2020’s high-water mark and is more in line with the historical average. Statistically fewer respondents report awareness of ENERGY STAR, both aided (86%; -6 pts) and unaided (55%; - 18 pts), than did in 2020, with scores on both counts closer to what was observed in 2018.

Table 1: Awareness of ENERGY STAR

	Awareness of ENERGY STAR			
	Unaided		Aided	
	2022	2020	2022	2020
Yes, aware	55%	73%	86%	92%

¹ Unaided refers to the percentage of the respondents who recall the brand or label without any visual assistance. Aided refers to the percentage of respondents who recognize the brand or label when prompted with an image.

No, not aware	36%	22%	11%	6%
Don't know	9%	-	3%	-

Those who are aware of the ENERGY STAR brand are holding increasingly favourable views of it, over time. With the exception of seeing the ENERGY STAR product and holding the perception that they are getting a more efficient product, positive attitudinal metrics and impressions of the brand are up significantly, relative to 2020. In fact, in many cases attitudinal scores achieved historic highs, relative to all previous iterations of this survey. Most notably, strong majorities and statistically higher proportions relative to 2020 believe that ENERGY STAR certified products provide them with more benefits (71%; +19 pts vs. 2020), are confident that products which carry the ENERGY STAR label have been rigorously tested and proven to be energy efficient (70%; +4 pts), feel like they are contributing to society by buying ENERGY STAR products (69%; +16 pts), think they are protecting the environment for future generations by buying ENERGY STAR products (69%; +8 pts), and think ENERGY STAR products offer better value than products without the mark (55%; +12 pts).

Table 2: Attitudes towards ENERGY STAR Brand [Those Aware]

Those Aware of ENERGY STAR Over Time		
Statements	% agreeing [scores of 4-5]	
	2022	2020
<i>ENERGY STAR certified products provide me with more benefits than products without the ENERGY STAR symbol</i>	71%	52%
<i>I am confident that products which carry the ENERGY STAR symbol have been rigorously tested and proven to be energy efficient</i>	70%	66%
<i>Buying ENERGY STAR certified products makes me feel like I am contributing to society</i>	69%	53%
<i>Buying ENERGY STAR certified products makes me feel like I am helping to protect the environment for future generations</i>	69%	61%
<i>ENERGY STAR certified products offer better value than products without the label.</i>	55%	43%

Willingness to pay extra for the ENERGY STAR brand among those who are aware of it is on par with 2020, though this continues to track well below what was observed in earlier surveys. There has been limited movement since 2020 with about as many saying they would be willing to pay 5% (48%), 10% (42%) or 15% (37%) extra for the ENERGY STAR brand.

Table 3: Attitudes towards ENERGY STAR Brand [Those Aware] – Willingness to pay more

Those Aware of ENERGY STAR Over Time		
Statements	% agreeing [scores of 4-5]	
	2022	2020
<i>I would purchase an ENERGY STAR certified product even if it cost 5% more than a similar product without the mark</i>	48%	51%
<i>I would purchase an ENERGY STAR certified product even if it cost 10% more than a similar product without the mark</i>	42%	45%

<i>I would purchase an ENERGY STAR certified product even if it cost 15% more than a similar product without the mark</i>	37%	38%
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Awareness of the ENERGY STAR Most Efficient designation – both aided and unaided – has increased significantly since 2020. Unaided, more than one in four (27%) of those that recall seeing the ENERGY STAR symbol report awareness of the ENERGY STAR Most Efficient designation compared to fewer than one in five (18%) in 2020. Around the same proportion (25%) indicate awareness of the ENERGY STAR Most Efficient designation when aided with visuals, a figure which doubles what was observed in 2020 (12%).

Table 4: Awareness of ENERGY Most Efficient Designation

	Awareness of ENERGY STAR most efficient designation Over Time			
	Unaided		Aided	
	2022	2020	2022	2020
Yes, aware	27%	18%	25%	12%
No, not aware	56%	64%	67%	82%

The ENERGY STAR Most Efficient designation is most commonly associated with high quality and being the best of the best. At around one in three, the highest proportion of those who recall seeing the ENERGY STAR Most Efficient symbol feel as though the best of the best/top ENERGY STAR performers (36%) and higher quality (35%) are the most relevant statements that can be used to describe the ENERGY STAR Most Efficient symbol.

2. PURCHASING DECISIONS & BEHAVIOUR

The incidence of those who are purchasing ENERGY STAR certified products has rebounded somewhat, after hitting lows across most metrics in 2020. There has been a statistically significant increase in the proportion of those who claim to have purchased a home, windows or doors, home electronics, or office products in the past 12 months who report purchasing ENERGY STAR certified homes (39%; +19 pts vs. 2020), windows or doors (60%; +8 pts), home electronics (48%; +9 pts) or office products (43%; +13 pts), specifically.

Table 5: Proportion of Recent Purchases that were ENERGY STAR certified Over Time

	Proportion of Recent Purchases that were ENERGY STAR Certified Over Time	
	2022	2020
Windows or doors	60%	52%
Home electronics product	48%	39%
Home office product	43%	30%
Home or residence	39%	20%

The ENERGY STAR symbol is generally exercising more influence over the purchasing decision than it did in 2020. There has been a significant increase in the influence of the ENERGY STAR symbol for purchasing home office (39%; +22 pts vs 2020) and home electronic products (41%; +16 pts), specifically, and directional increases in the proportion who admit the ENERGY STAR symbol has influenced their decision to purchase most other home products, among those who purchased ENERGY STAR certified products.

Table 6: Influence of ENERGY STAR Brand on Purchase Over Time

Influence of ENERGY STAR Brand on Purchase Over Time		
	% saying Very much	
	2022	2020
Home electronics product	41%	25%
Home office product	39%	17%

Improving performance, energy savings, and functionality are the top motivations for replacing equipment at home, with all of these factors perceived as being more important than they were in 2020. Better performance (76%; +13 pts vs. 2020), energy savings (75%; +18 pts), or improved functionality (73%; +10 pts) top the list as the most important factors that motivate respondents to consider replacing appliances, electronics, and heating/cooling equipment at their home.

Table 7: Motivations to Replace Equipment at Home

Motivations to Replace Equipment at Home Over Time		
	% Saying Very much/somewhat motivated	
	2022	2020
Energy savings	75%	57%
Better performance	76%	63%
Improved functionality	73%	63%

Despite the recognized importance of energy efficiency, fewer are trying to get the most energy efficient product that meets their needs or perceive energy efficiency ratings as being a significant factor in the decision-making process. It could be that price now carries more significance, given that the 2022 survey fielded during a time when inflation and affordability issues were top of mind. What's more, respondents rank purchase price as the top importance factor (34% rank 1) when considering buying an appliance, followed by energy efficiency (26%). Indeed, compared to 2020, fewer (69%; -5 pts) are trying to get the most energy efficient product that meets their needs and more (23%; +3 pts) admit that energy efficiency ratings are not a significant factor in their decision-making process. Consistent with 2020, just under half (46%) claim to be always purchasing the most energy efficient products.

Table 8: Decisions When Purchasing Energy Efficient Products Over Time

Decisions When Purchasing Energy Efficient Products Over Time		
	% agreeing [scores of 4-5]	
	2022	2020
I try to get the most energy efficient product that meets my needs	69%	74%
I always purchase the most energy efficient product	46%	45%
Energy efficiency ratings are not a significant factor in my decision-making	23%	20%

There is growing support for companies that make efforts to save energy and help the environment. There has been a significant increase (70%; +6 pts vs. 2020) in the proportion of respondents who say they would be more likely to purchase products or services from a company that makes efforts to save energy and help the environment.

Table 9: Attitudes Towards Purchasing Products from Companies that Help the Environment Over Time

Attitudes Towards Purchasing Products from Companies that Help the Environment Over Time		
	% More likely [scores of 4-5]	
	2022	2020
<i>Would you be more or less likely to purchase products or services from a company that makes efforts to save energy and help the environment?</i>	70%	64%

3. ENERGY STAR CERTIFICATION FOR HOMES

Awareness of ENERGY STAR certification for homes is up significantly, relative to 2020, and is the highest it's ever been since this question was introduced in the 2016 iteration of the survey. When asked about their awareness of ENERGY STAR certification for homes, around two in five (38%; +12 pts vs. 2020; +7 pts vs. 2018; +2 pts vs. 2016) say they are aware of this certification.

Table 10: Awareness of ENERGY STAR Home Over Time

Awareness of ENERGY STAR Home Over Time		
	2022	2020
Yes	38%	26%
No	62%	66%

There is a growing belief that an ENERGY STAR certified home offers better value than a home that is not ENERGY STAR certified. Statistically higher proportions relative to 2020 (76%; +5 pts) agree that an ENERGY STAR certified home would offer better value than a home without the certification.

Table 11: Perceptions of ENERGY STAR for Home Over Time

Perceptions of ENERGY STAR for Home Over Time		
	2022	2020
Strongly agree	36%	24%
Agree	39%	47%
Neutral	17%	17%
Disagree	2%	4%
Strongly disagree	1%	2%

Consistent with what was observed in 2020 (and previous years), a majority would purchase an ENERGY STAR certified home even if it cost \$5k more than a home that is not certified. Even if the amount were to increase by \$10k or \$15k, close to half say they would purchase an ENERGY STAR certified home. Three in five (59%) say they would purchase an ENERGY STAR certified home even if it cost \$5,000 more than a home that is not certified. Not surprisingly,

willingness to pay extra decreases as the amount increases, as fewer say they would purchase an ENERGY STAR certified home when increasing the costs by \$10,000 (47%) or \$15,000 (41%).

Table 12: Perceived Value (\$) of ENERGY STAR for Home

	Perceived Value (\$) of ENERGY STAR for Home Over Time	
	2022	2020
	% agreeing [scores of 4-5]	
\$5,000 more than a home that isn't ENERGY STAR-certified	59%	62%
\$10,000 more than a home that isn't ENERGY STAR-certified	47%	47%
\$15,000 more than a home that isn't ENERGY STAR-certified	41%	38%

A great deal of importance is placed on all of ENERGY STAR certified home features. The vast majority assign a high degree of importance to efficient heating and cooling (85%), and a similar proportion believes higher insulation levels (83%), and high performing windows and doors (82%) are important. Around three quarters assign a high degree of importance to additional air-sealing (76%), a whole-home ventilation system (75%) and ENERGY STAR certified products, such as lighting and appliances (74%).

Table 13: Importance of ENERGY STAR® certified Home Features Over Time

	Importance of ENERGY STAR® certified Home Features Over Time	
	2022	2020
	% Saying Very important	
Efficient heating and cooling	85%	88%
Higher insulation levels	83%	87%
High performing window and doors	82%	88%
ENERGY STAR certified products, such as lighting and appliances	74%	74%
Additional air-sealing	76%	74%
A whole-home ventilation system	75%	72%

Saving money on energy bills is rated as the most important feature of ENERGY STAR certified homes. At around nine in ten (88%), the vast majority assign a high degree of importance to saving money on their energy bill. This is a finding that underscores the importance of financial considerations in the decision calculus and might also have been influenced by the context within which the 2022 survey was fielded – a period of high inflation and heightened affordability concerns.

Table 14: Importance to Buy an ENERGY STAR certified Home Over Time

	Importance of Different Reasons to Buy an ENERGY STAR certified Home Over Time	
	2022	2020
	% Important [scores of 4-5]	
Saving money on your energy bill	88%	93%

4. ENERGUIDE LABELLING PROGRAM

Awareness of the EnerGuide label – both unaided and aided – has declined significantly since 2020. There has been a significant decline in unaided (22%; -16 pts) and aided (65%; -12 pts) awareness of the EnerGuide Labelling Program relative to 2020.

Table 15: Awareness of EnerGuide Label Over Time

Awareness of EnerGuide Label Over Time					
	Unaided		Aided		
	2022	2020	2022	2020	
Aware	22%	38%	65%	77%	
Not Aware	62%	50%	29%	19%	
Don't Know	16%	12%	6%	4%	

Consistent with what was observed in 2020, those who recall seeing the EnerGuide label continue to be most likely to have spotted it on a household appliance. The EnerGuide label is most likely to have been spotted on household appliances – specifically, refrigerators or freezers (57%) and clothes washers or dryers (53%). It is noteworthy, however, that statistically fewer report spotting the EnerGuide label on most household appliances – refrigerators or freezers (57%; -12 pts vs. 2020), clothes washers or dryers (53%; -9 pts), ranges (43%; -6 pts), or dishwashers (41%; -8 pts) than did in 2020.

Table 16: Source of Awareness of EnerGuide Label Over Time

Source of Awareness of EnerGuide Label Over Time		
	2022	2020
	%	%
Label shown on refrigerators or freezers	57%	69%
Label on clothes washers or dryers	53%	62%
Label on ranges (stoves)	43%	49%
Label on dishwashers	41%	49%

Energy use, energy efficiency, and comparing the energy consumption of one product to another are the considerations that are most closely linked with the EnerGuide label.

Majorities closely associate (rank 1-3 out of 6) energy use of the appliance (71%), energy efficiency (58%), and helping compare energy consumption of one product to another (53%) with the EnerGuide label.

While less than half would consider getting an EnerGuide home evaluation, few are dismissive of this idea. More than four in ten (43%) say they would get an EnerGuide home evaluation, while one in six (16%) say they would not consider doing this. This is a result that is in line with what was observed in 2020.

Table 17: Attitudes towards EnerGuide home evaluation Over Time

Attitudes towards EnerGuide home evaluation Over Time		
Statement	% agreeing [scores of 4-5]	
	2022	2020
I would consider obtaining an EnerGuide home evaluation	43%	42%

Statistically higher proportions, relative to 2020, contend that a home label indicating better energy efficiency would influence their decision to buy a house. Nearly two-thirds (63%; +11 pts) say a home label indicating better energy efficiency would influence their decision to buy a house.

Table 18: Influence of a Home Label When Buying a House Over Time

Influence of a Home Label When Buying a House Over Time		
Statement	% agreeing [scores of 4-5]	
	2022	2020
A home label indicating better energy efficiency would influence my decision to buy a house	63%	52%

The EnerGuide label exercises considerable influence over the purchase of many household products – gas fireplaces, air conditioners, heating or cooling equipment, and various household appliances. Purchasers generally feel influenced by the EnerGuide label when purchasing products, particularly when it comes to gas fireplaces (83% at least somewhat influenced), heating or cooling equipment (68%), air conditioners (65%) and home appliances such as dishwashers (74%), clothes washers or dryers (69%), ranges (stoves) (69%), or refrigerators or freezers (68%). What’s more, around half that purchased these products indicate that it exercises considerable influence over their decision to buy a new house (54%) or car (46%). Perhaps most importantly, there have been increases in the proportions who say that their purchases of most products were influenced by the EnerGuide label, with the increases being statistically significant in most cases.

Table 19: Influence of EnerGuide Label on Purchase Over Time

	% Very much / Somewhat [scores of 3-4]	
	2022	2020
A gas fireplace	83%	54%
A dishwasher	74%	47%
A clothes washer or dryer	69%	53%
A range	69%	44%
Heating or cooling equipment	68%	47%
A refrigerator or freezer	68%	48%
A room air conditioner	65%	49%
A new home	54%	22%
A new car	46%	20%

There is growing awareness of ENERGY STAR certification for buildings and industrial facilities. While fewer than half (43%) indicate at least vague familiarity with this certification, there has been a significant increase (13%; +3 pts) in the proportion who claim to be “clearly” aware of the fact that buildings and industrial buildings can be ENERGY STAR certified.

Table 20: Awareness of ENERGY STAR Certification on Buildings and Industrial Facilities Over Time

Awareness of ENERGY STAR Certification on Buildings and Industrial Facilities Over Time		
	2022	2020
	%	%
Yes, clearly	13%	10%
Yes, vaguely	29%	29%
No, not at all	44%	52%
Don't know	14%	8%

