



Project Energy

Online Omnibus in 7 markets
May 2008

Ipsos MORI




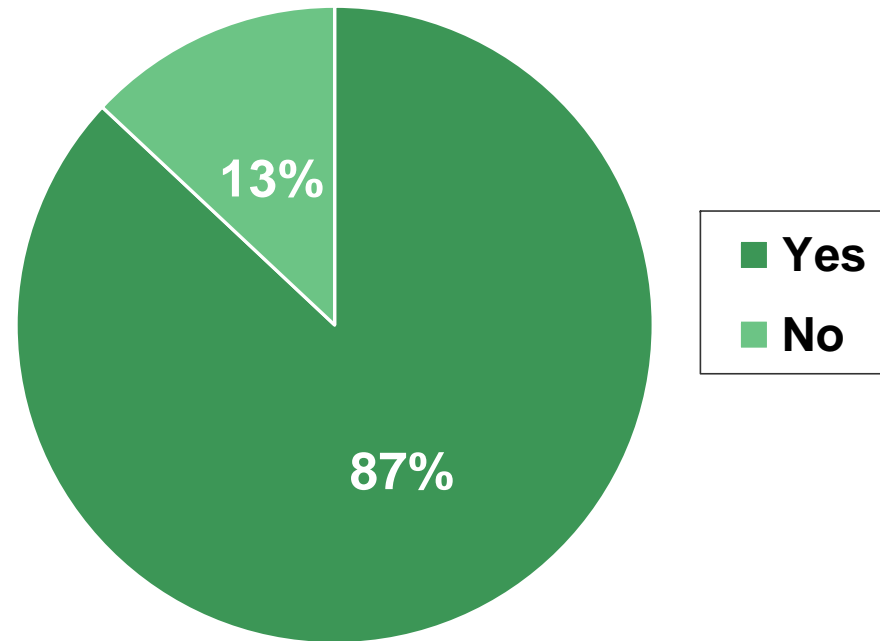
Methodology

- All fieldwork was conducted via Ipsos MORI's Online Omnibus
- Fieldwork took place between 16th and 19th May 2008
- 1,000 people aged 16-64 were interviewed in each market (16-59 in Poland)

Q1 Awareness - GB

“Please look at the label below. Have you ever seen this label before?”

Energy	
Manufacturer Model	Fridge
More efficient	
A	A
B	
C	
D	
E	
F	
G	
Less efficient	
Energy consumption kWh/year <small>(Based on standard test results for 24h)</small>	124
<small>Actual consumption will depend on how the appliance is used and where it is located</small>	
Fresh food volume l Frozen food volume l	115 6
Noise <small>(dB(A) re 1 pW)</small>	***
<small>Further information is contained in product brochures</small>	
<small>Norm EN 153 May 1990 Refrigerator Label Directive 94/2/EC</small>	

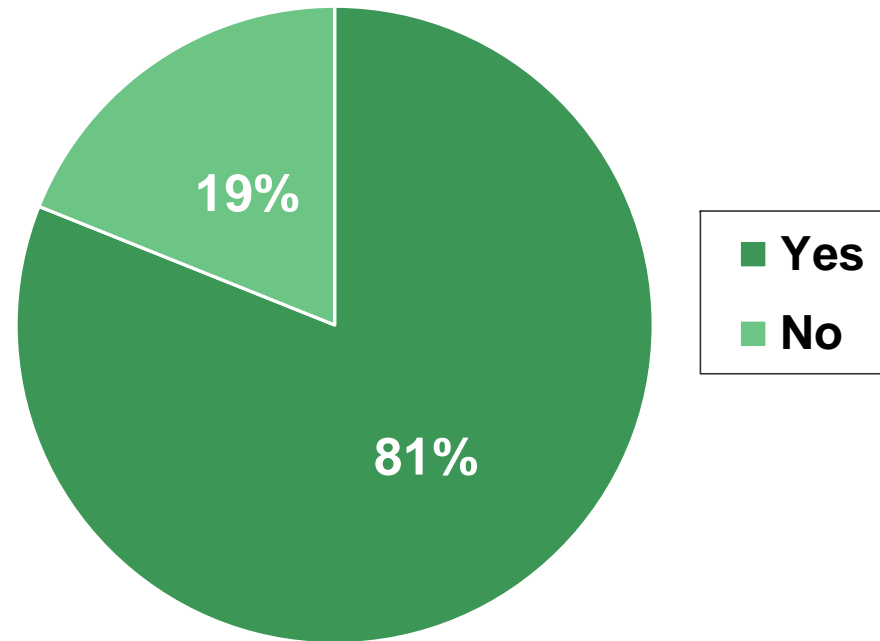


Base: 1,000 adults aged 16-64

Q1 Awareness - Poland

“Please look at the label below. Have you ever seen this label before?”


Energy	
Manufacturer Model	Fridge
More efficient	
	A
Less efficient	
Energy consumption kWh/year <small>(Based on standard test results for 24h)</small>	124
<small>Actual consumption will depend on how the appliance is used and where it is located</small>	
Fresh food volume l Frozen food volume l	115 6
Noise (dB(A) re 1 pW)	
<small>Further information is contained in product brochures</small>	
<small>Norm EN 153 May 1990 Refrigerator Label Directive 94/2/EC</small>	

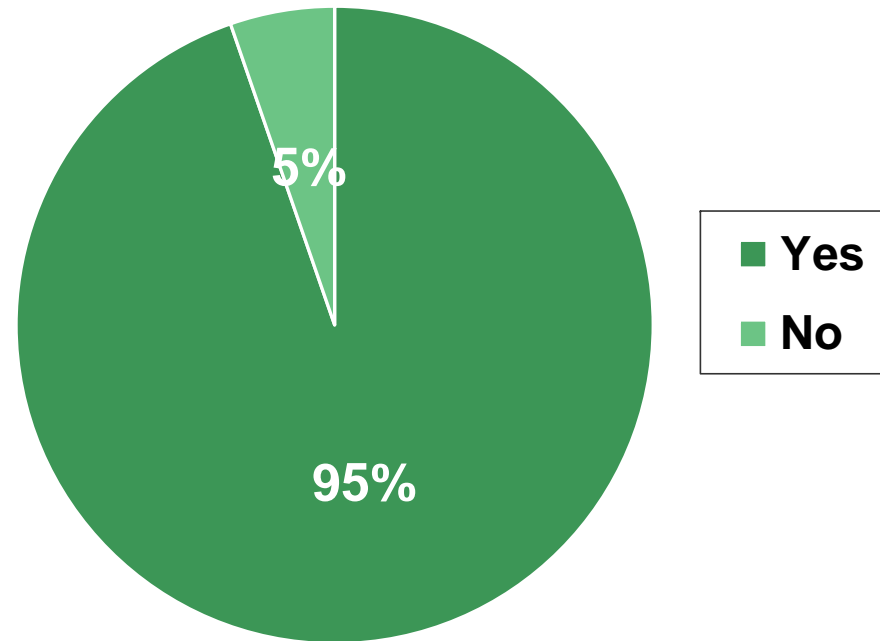


Base: 1,000 adults aged 16-59

Q1 Awareness - Denmark

“Please look at the label below. Have you ever seen this label before?”


Energy	
Manufacturer Model	Fridge
More efficient	
A	A
B	
C	
D	
E	
F	
G	
Less efficient	
Energy consumption kWh/year <small>(Based on standard test results for 24h)</small>	124
<small>Actual consumption will depend on how the appliance is used and where it is located</small>	
Fresh food volume l Frozen food volume l	115 6
Noise (dB(A) re 1 pW)	***
<small>Further information is contained in product brochures</small>	
<small>Norm EN 153 May 1990 Refrigerator Label Directive 94/2/EC</small>	

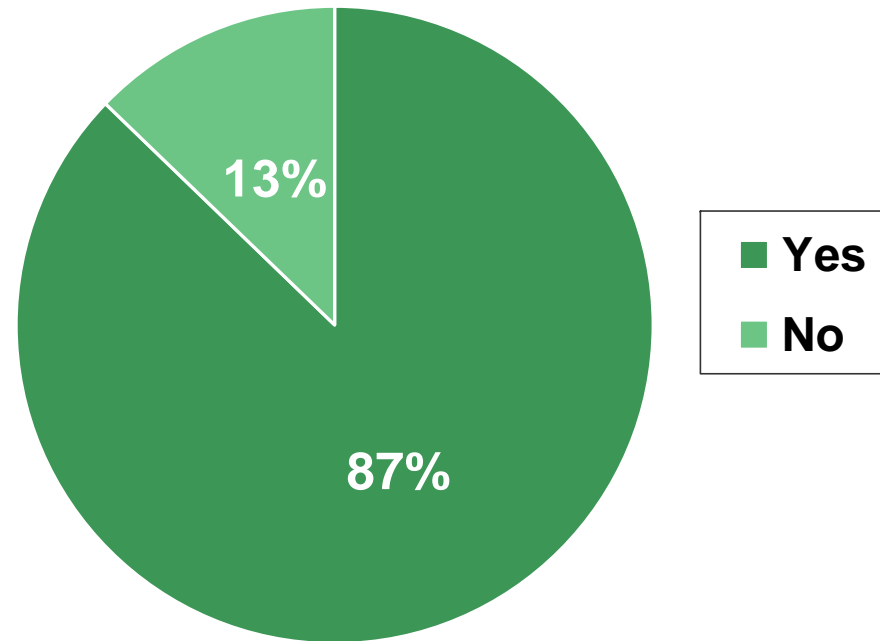


Base: 1,000 adults aged 16-64

Q1 Awareness - Germany

“Please look at the label below. Have you ever seen this label before?”

Energy	
Manufacturer Model	Fridge
More efficient	
A	A
B	
C	
D	
E	
F	
G	
Less efficient	
Energy consumption kWh/year <small>(Based on standard test results for 24h)</small>	124
<small>Actual consumption will depend on how the appliance is used and where it is located</small>	
Fresh food volume l Frozen food volume l	115 6
Noise (dB(A) re 1 pW)	***
<small>Further information is contained in product brochures</small>	
<small>Norm EN 153 May 1990 Refrigerator Label Directive 94/2/EC</small>	

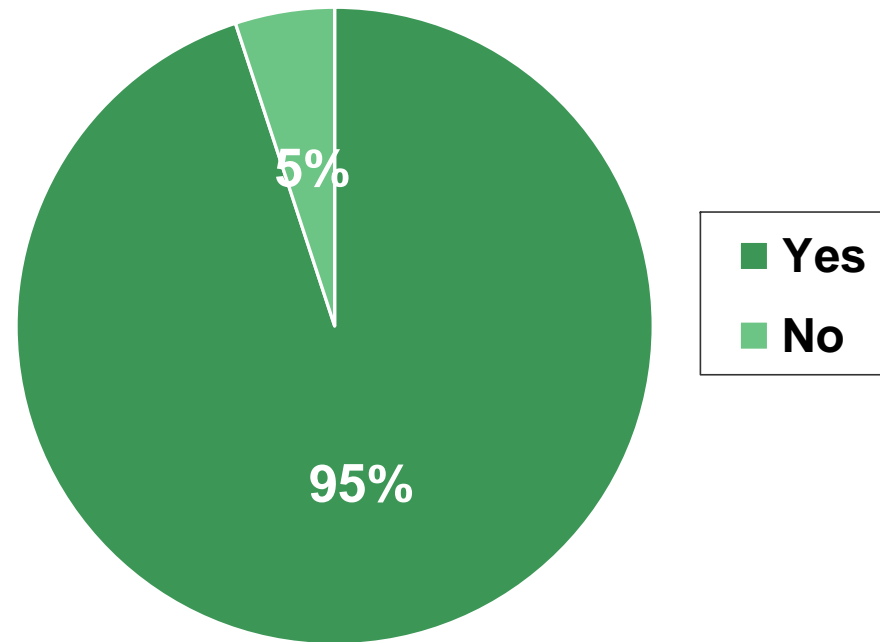


Base: 1,000 adults aged 16-64

Q1 Awareness - Netherlands

“Please look at the label below. Have you ever seen this label before?”


Energy	
Manufacturer Model	Fridge
More efficient	
	A
Less efficient	
Energy consumption kWh/year <small>(Based on standard test results for 24h)</small>	124
<small>Actual consumption will depend on how the appliance is used and where it is located</small>	
Fresh food volume l Frozen food volume l	115 6
Noise (dB(A) re 1 pW)	
<small>Further information is contained in product brochures</small>	
<small>Norm EN 153 May 1990 Refrigerator Label Directive 94/2/EC</small>	

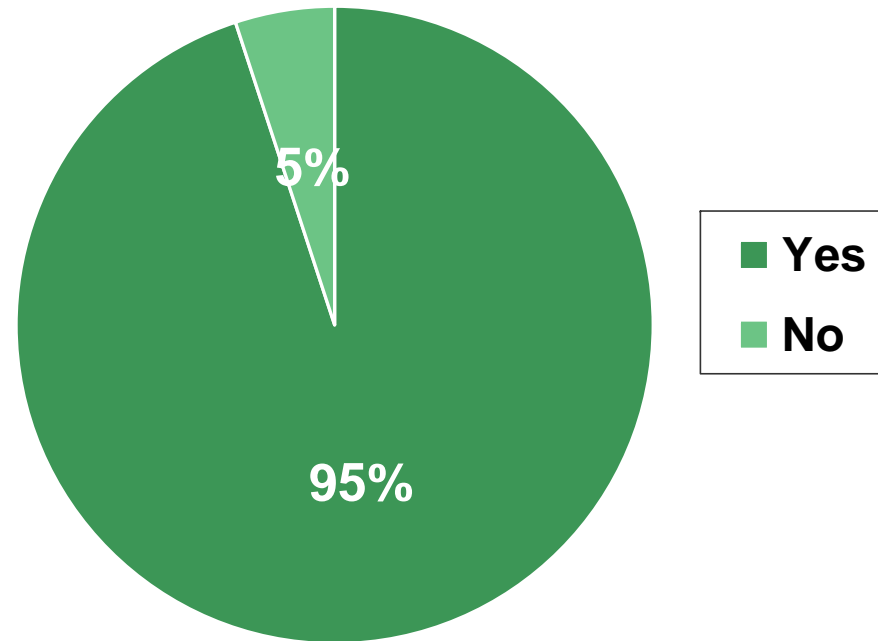


Base: 1,000 adults aged 16-64

Q1 Awareness - France

“Please look at the label below. Have you ever seen this label before?”


Energy	
Manufacturer Model	Fridge
More efficient	
A	A
B	
C	
D	
E	
F	
G	
Less efficient	
Energy consumption kWh/year <small>(Based on standard test results for 24h)</small>	124
<small>Actual consumption will depend on how the appliance is used and where it is located</small>	
Fresh food volume l Frozen food volume l	115 6
Noise (dB(A) re 1 pW)	***
<small>Further information is contained in product brochures</small>	
<small>Norm EN 153 May 1990 Refrigerator Label Directive 94/2/EC</small>	

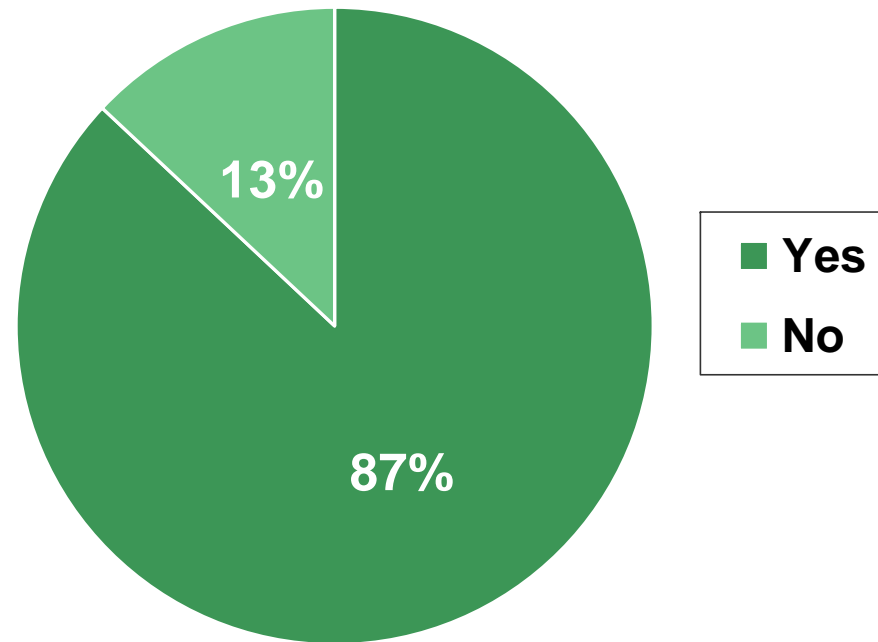


Base: 1,000 adults aged 16-64

Q1 Awareness - Italy

“Please look at the label below. Have you ever seen this label before?”

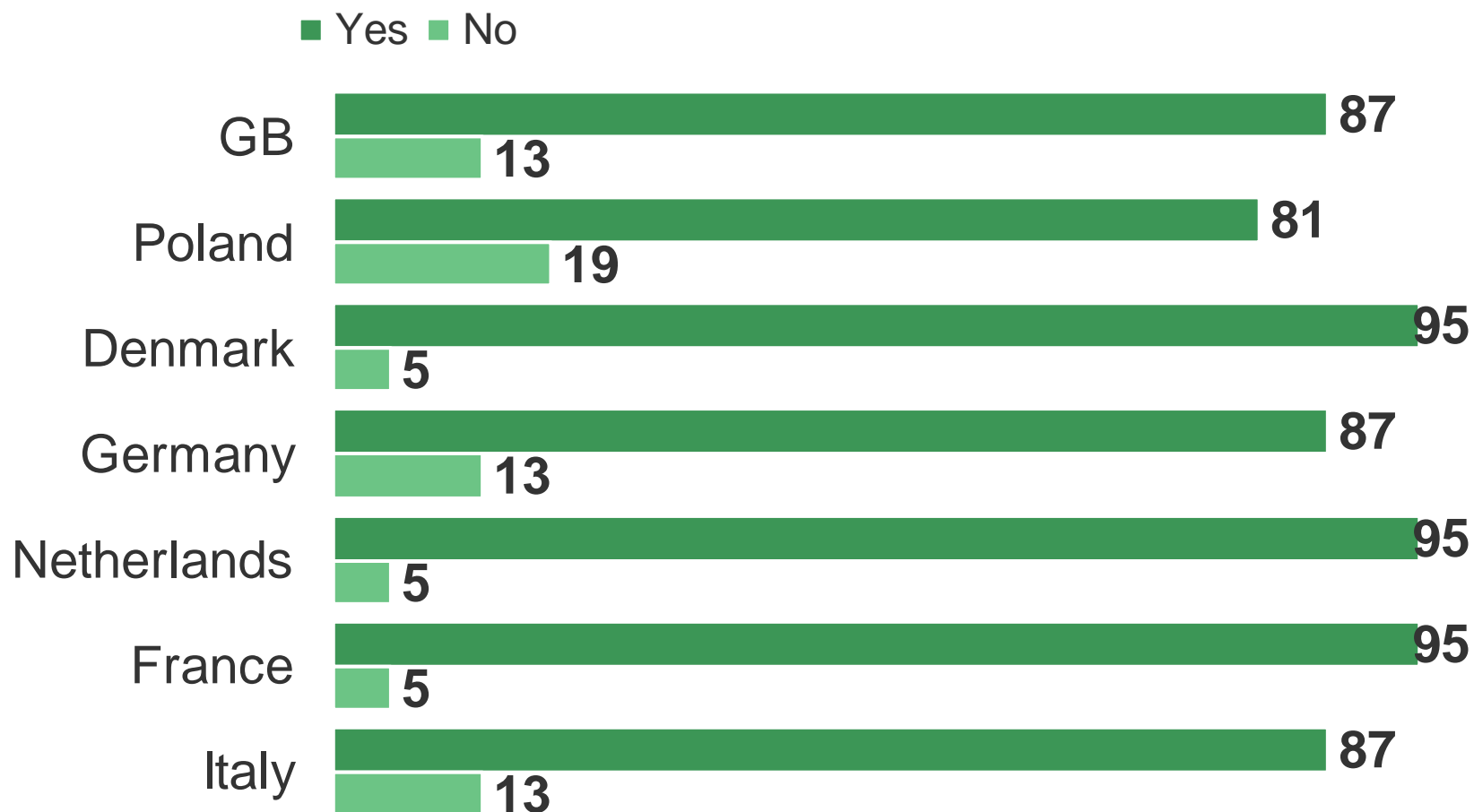
Energy	
Manufacturer Model	Fridge
More efficient	
A	A
B	
C	
D	
E	
F	
G	
Less efficient	
Energy consumption kWh/year <small>(Based on standard test results for 24h)</small>	124
<small>Actual consumption will depend on how the appliance is used and where it is located</small>	
Fresh food volume l Frozen food volume l	115 6
Noise (dB(A) re 1 pW)	***
<small>Further information is contained in product brochures</small>	
<small>Norm EN 153 May 1990 Refrigerator Label Directive 94/2/EC</small>	



Base: 1,000 adults aged 16-64

Q1 Awareness - Summary

“Please look at the label below. Have you ever seen this label before?”



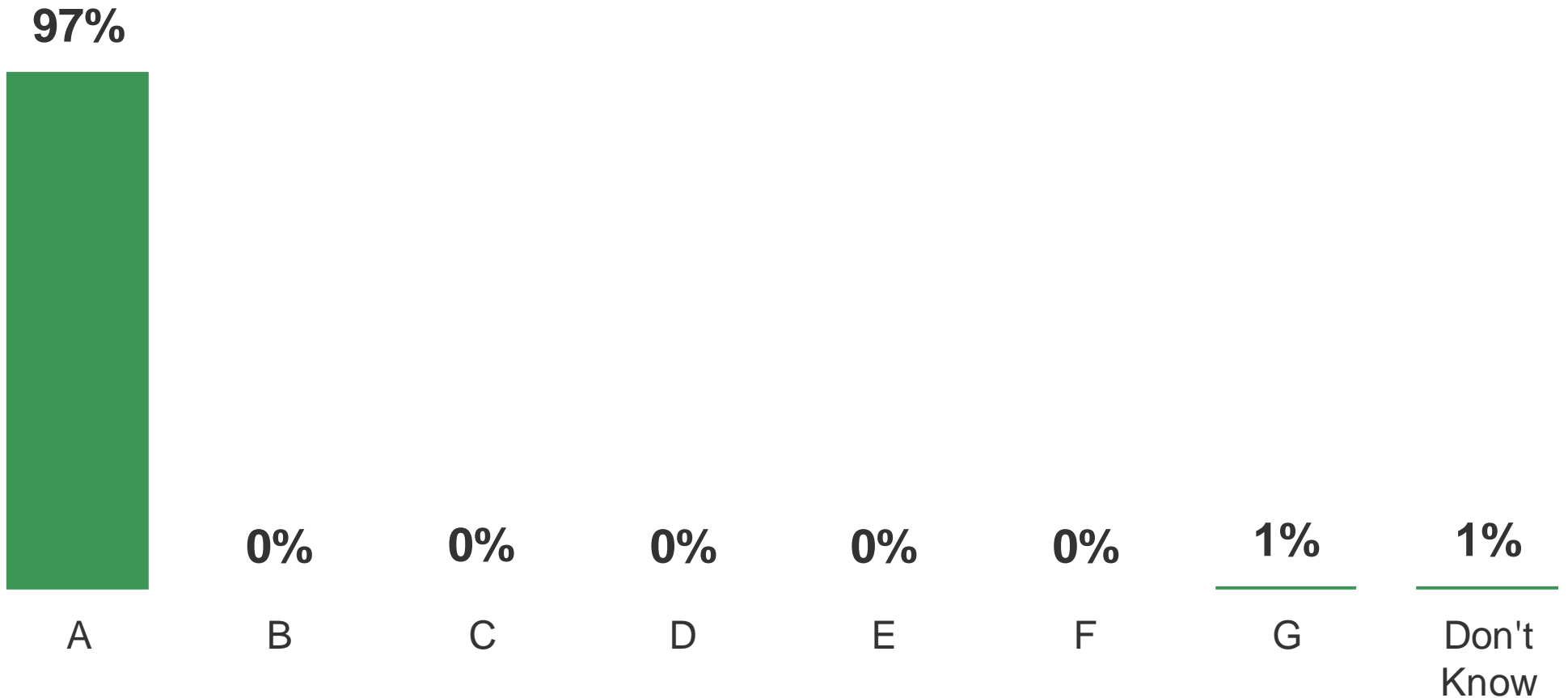
Base: 1,000 adults in each market

Q1 Awareness - Summary

- Level of awareness of A-G label varies from 81% in Poland to a high of 95% in Netherlands, France and Denmark.
- This result for Poland is significantly less than all the other markets
- There is strong awareness across all 7 markets with even the lowest country having 8 out of 10 people aware of the A-G label

Q2 Most Efficient Letter - GB

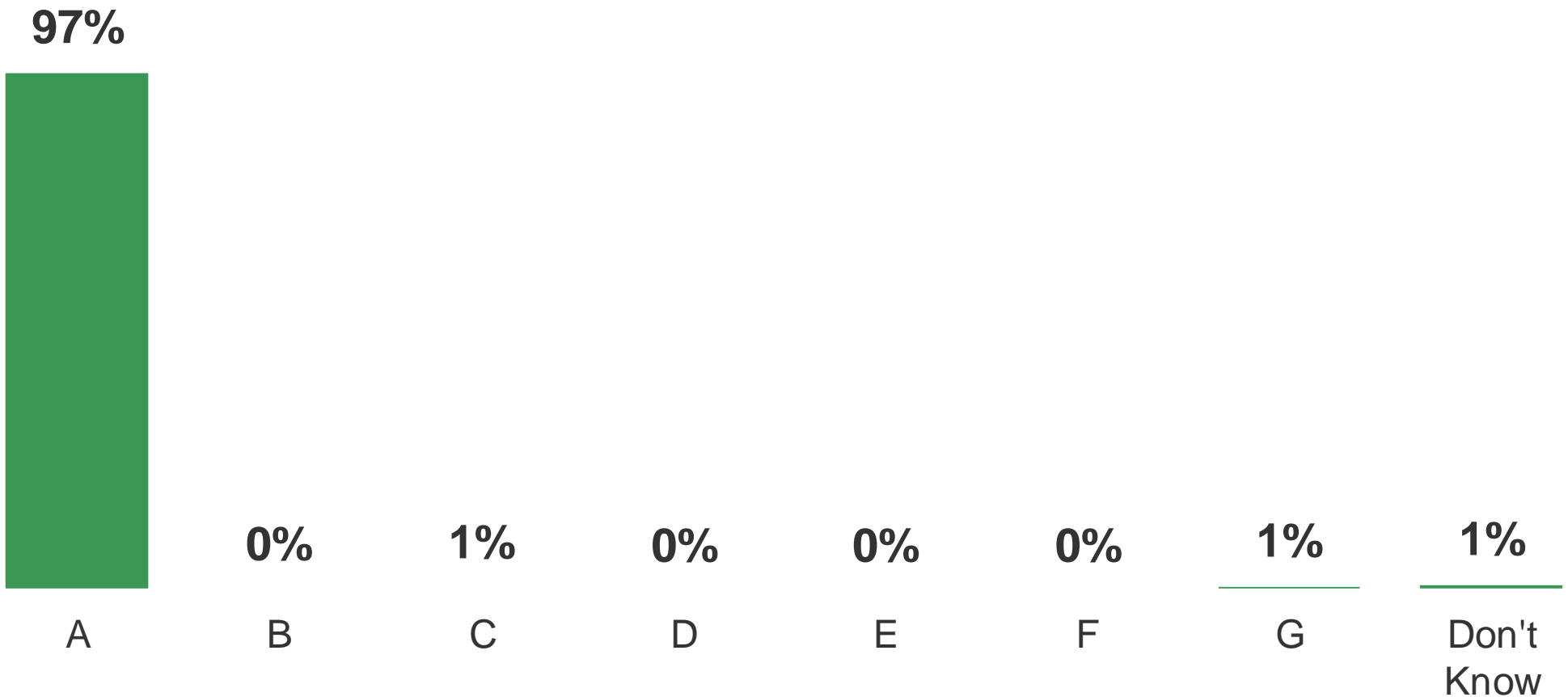
“Which letter on this label do you think indicates the MOST energy efficient product?”



Base: 1,000 adults aged 16-64

Q2 Most Efficient Letter - Poland

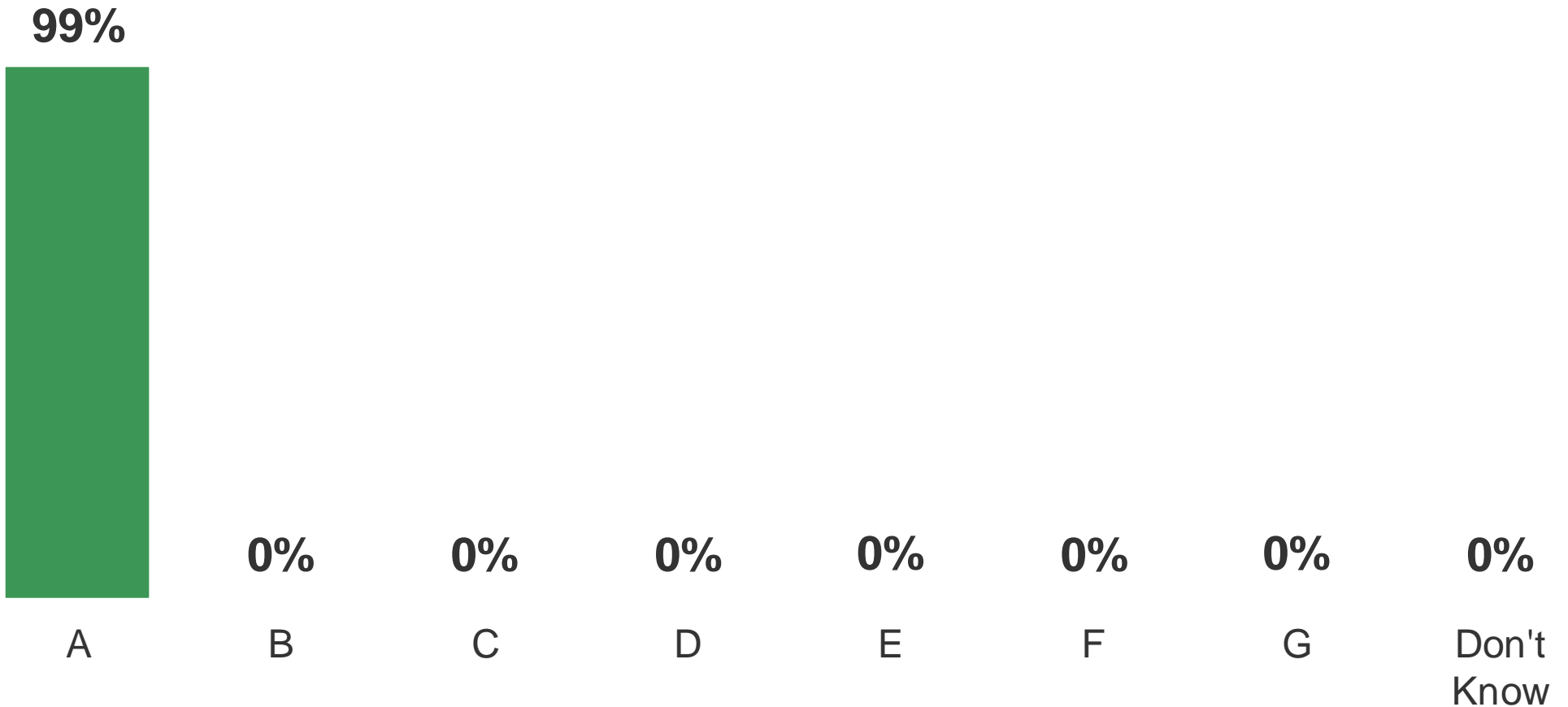
“Which letter on this label do you think indicates the MOST energy efficient product?”



Base: 1,000 adults aged 16-59

Q2 Most Efficient Letter - Denmark

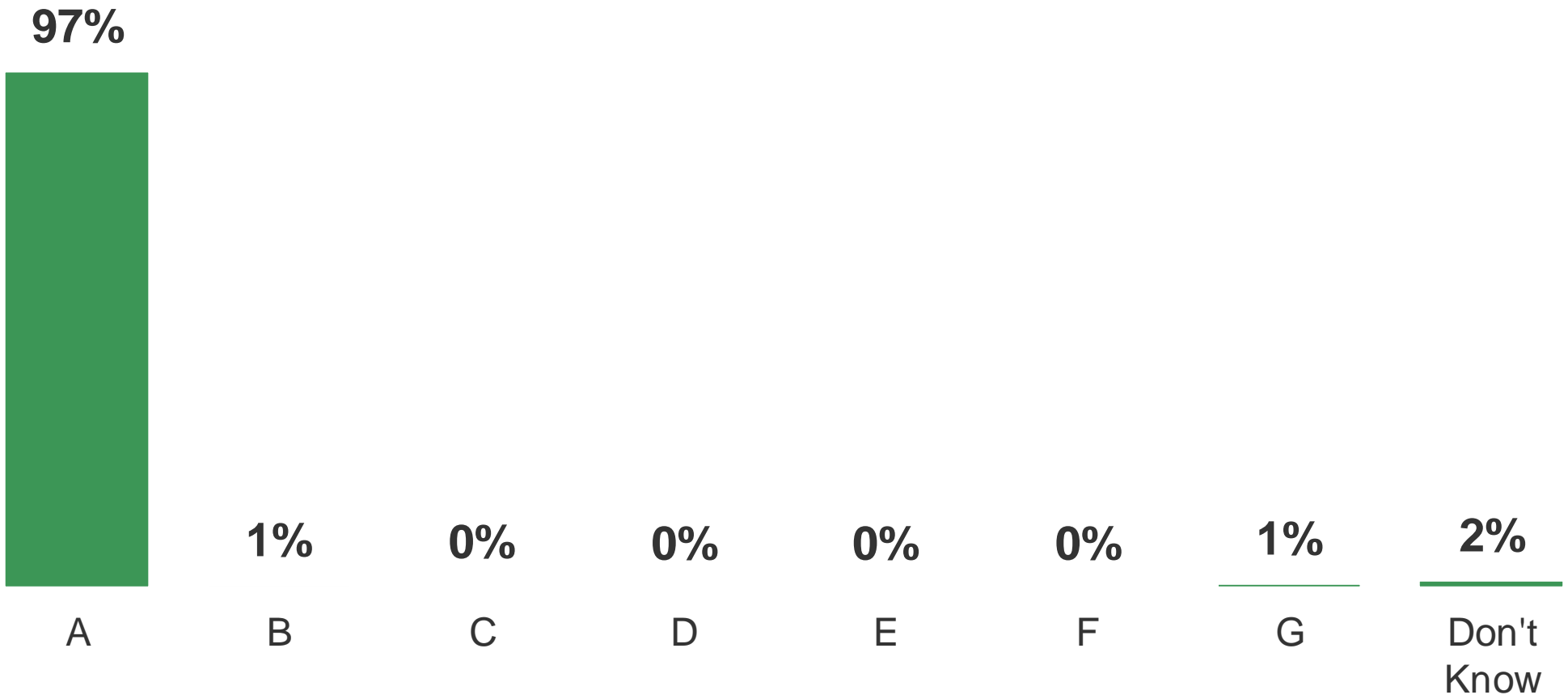
“Which letter on this label do you think indicates the MOST energy efficient product?”



Base: 1,000 adults aged 16-64

Q2 Most Efficient Letter - Germany

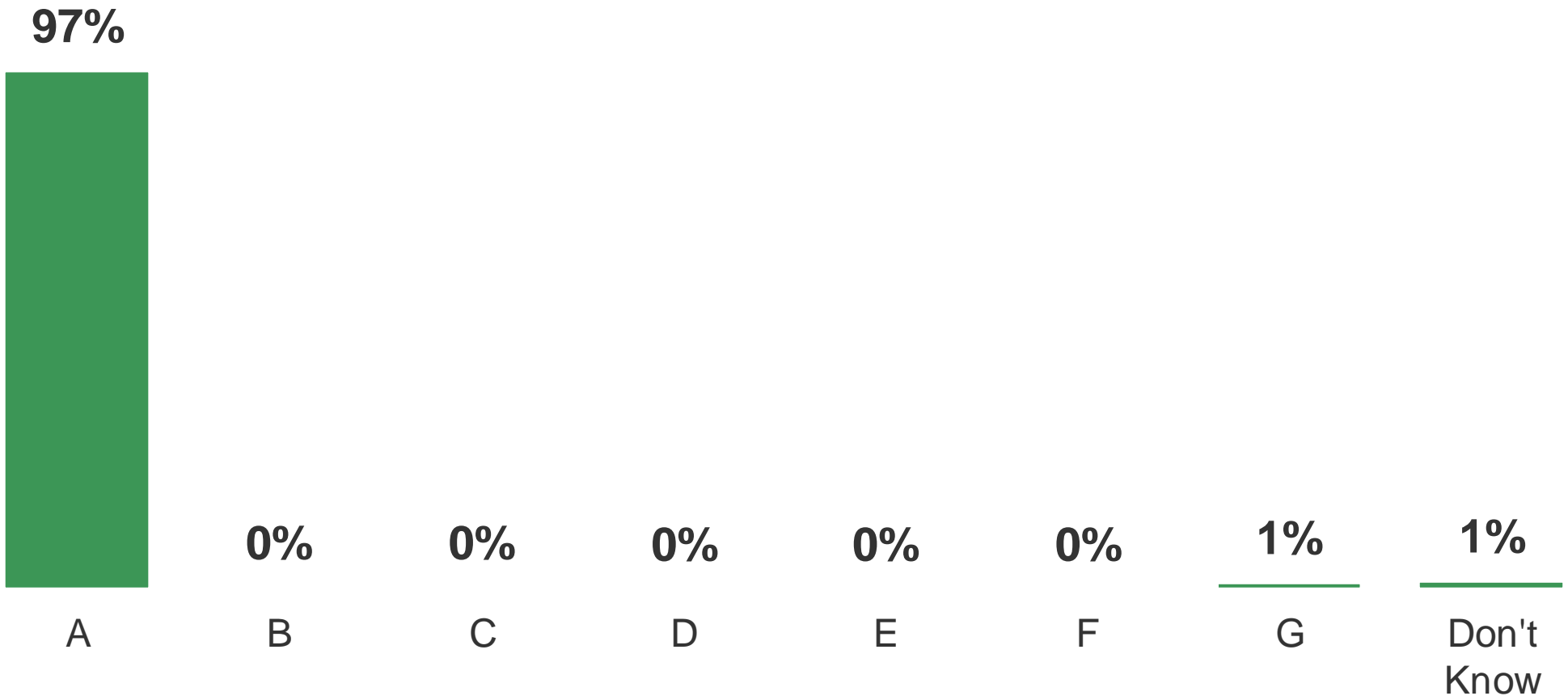
“Which letter on this label do you think indicates the MOST energy efficient product?”



Base: 1,000 adults aged 16-64

Q2 Most Efficient Letter - Netherlands

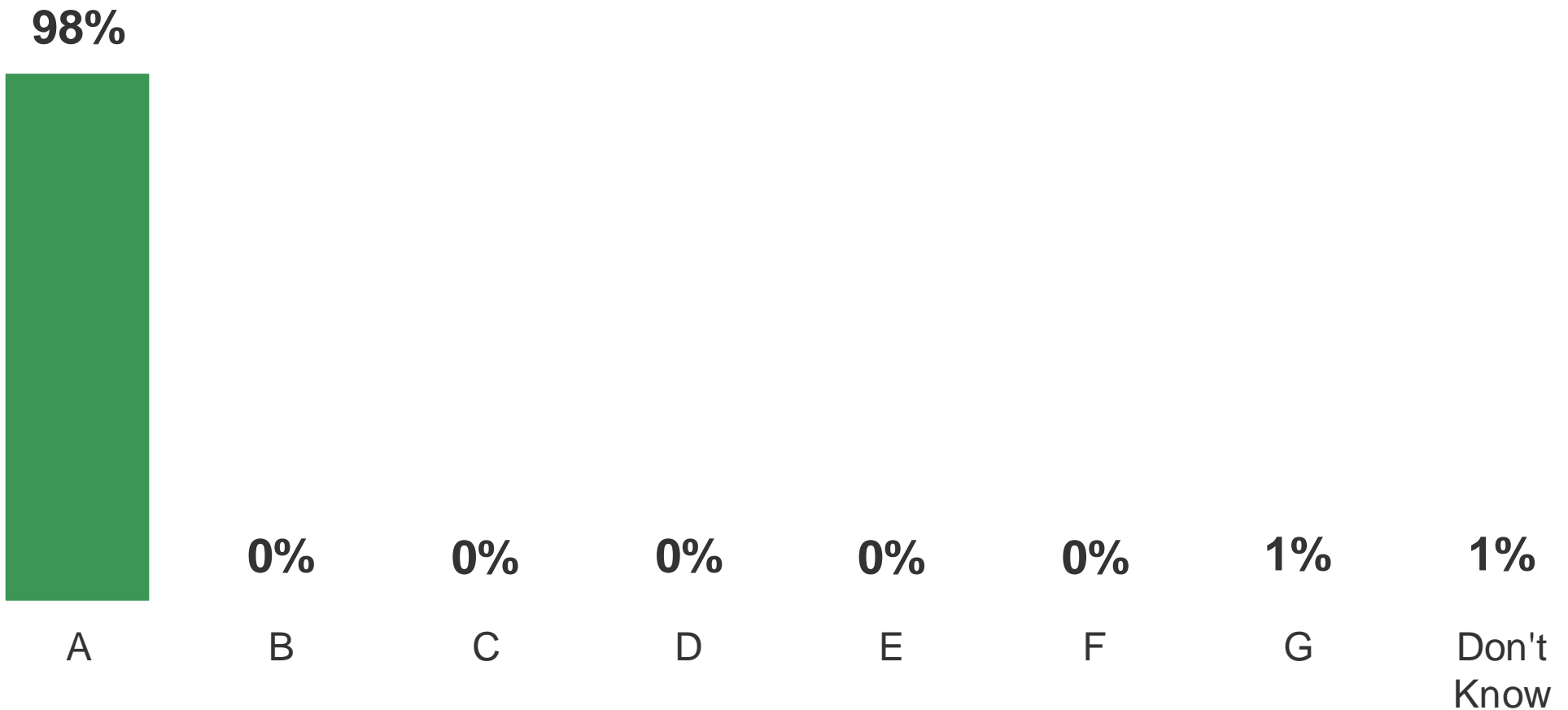
“Which letter on this label do you think indicates the MOST energy efficient product?”



Base: 1,000 adults aged 16-64

Q2 Most Efficient Letter - France

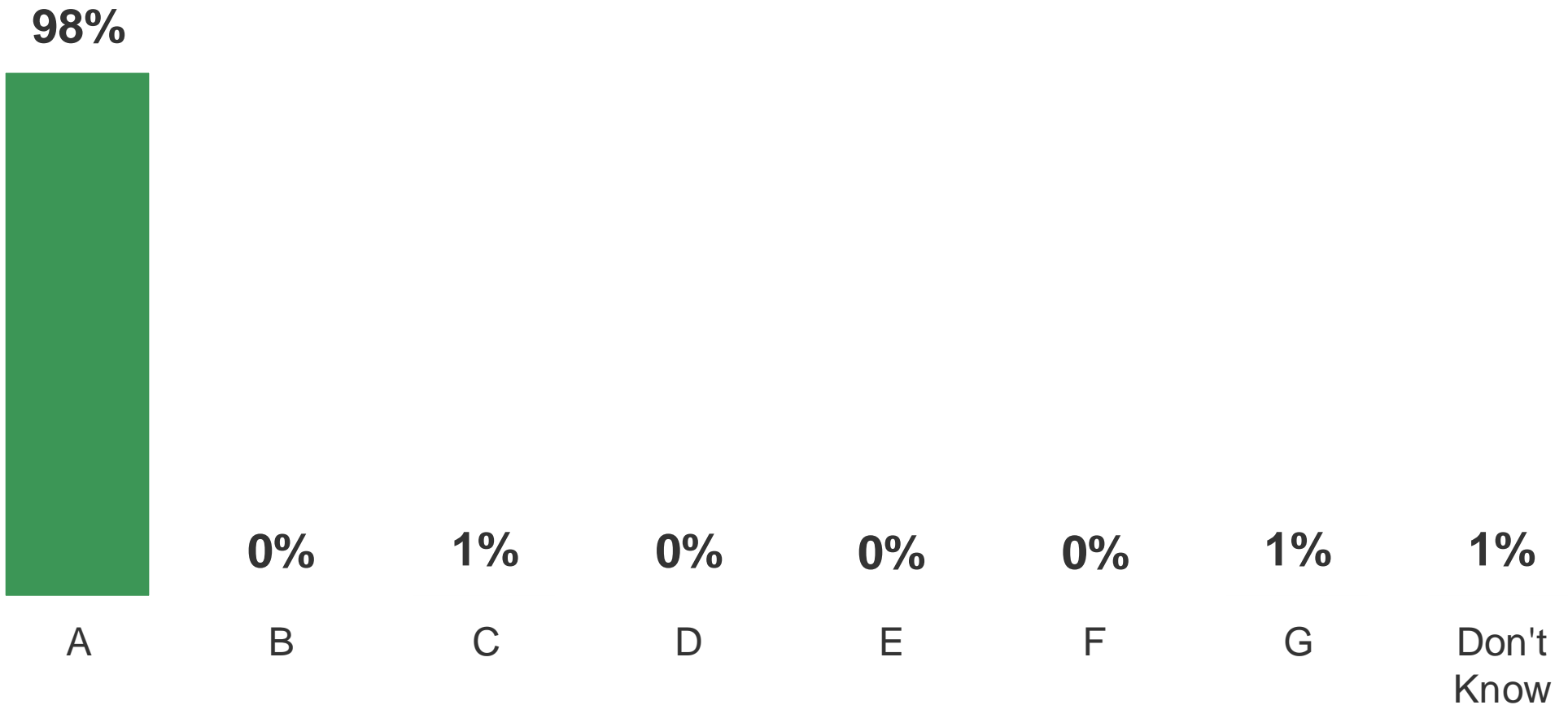
“Which letter on this label do you think indicates the MOST energy efficient product?”



Base: 1,000 adults aged 16-64

Q2 Most Efficient Letter - Italy

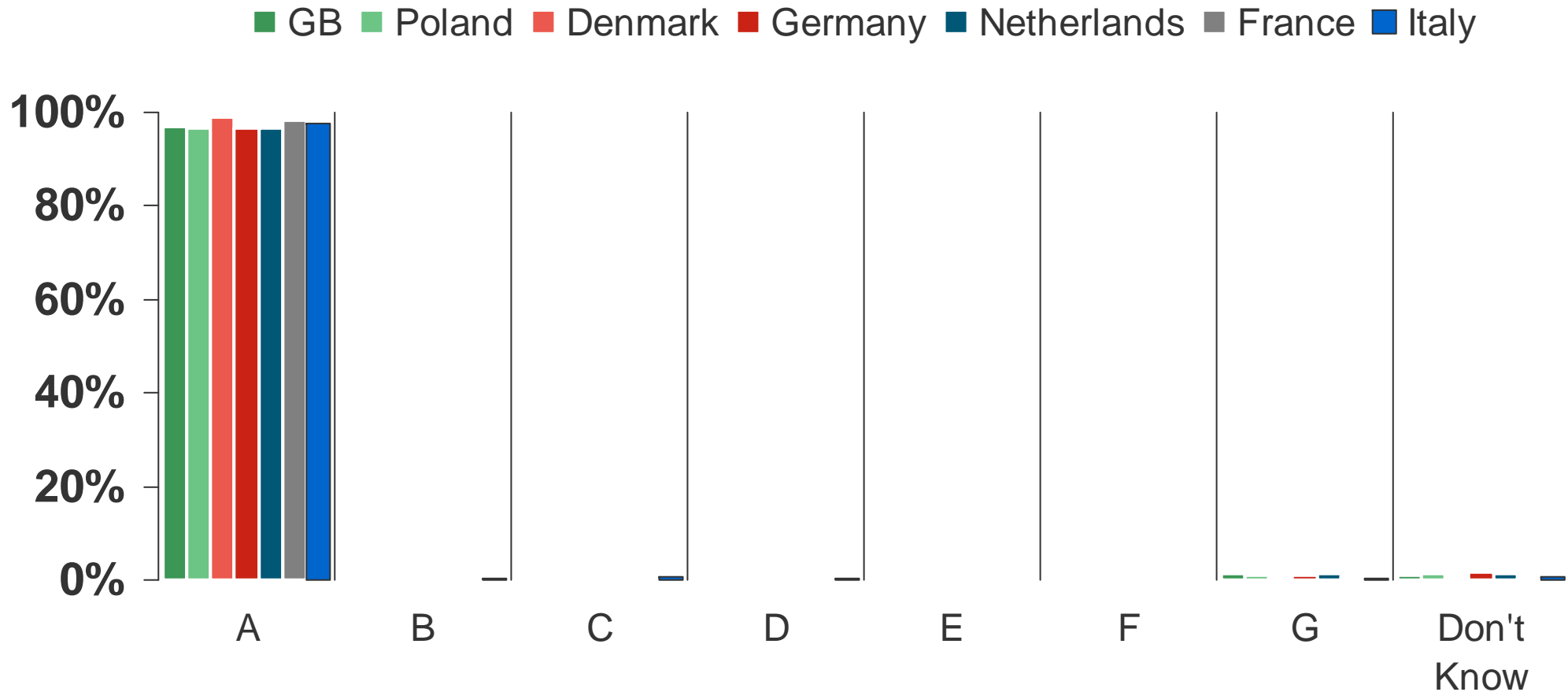
“Which letter on this label do you think indicates the MOST energy efficient product?”



Base: 1,000 adults aged 16-64

Q2 Most Efficient Letter - Summary

“Which letter on this label do you think indicates the MOST energy efficient product?”



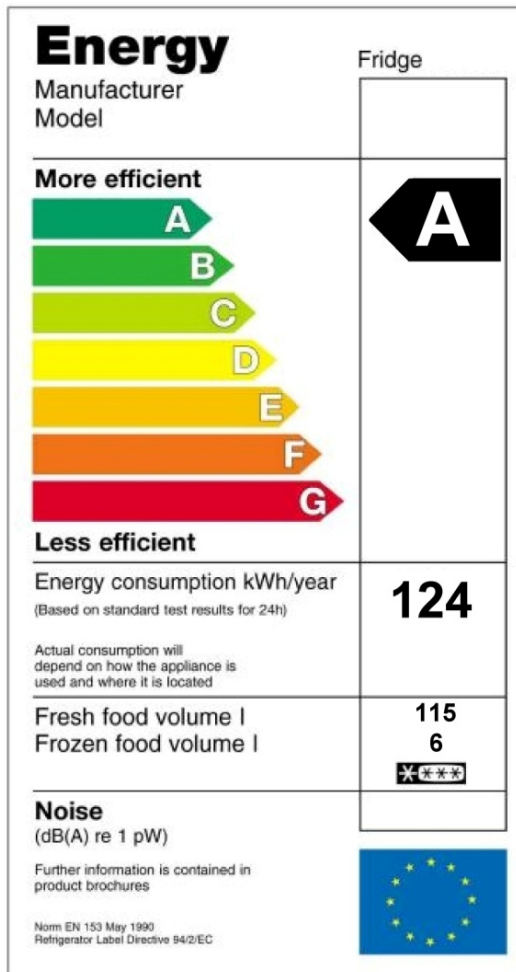
Base: 1,000 adults in each market

Q2 Most Efficient Letter - Summary

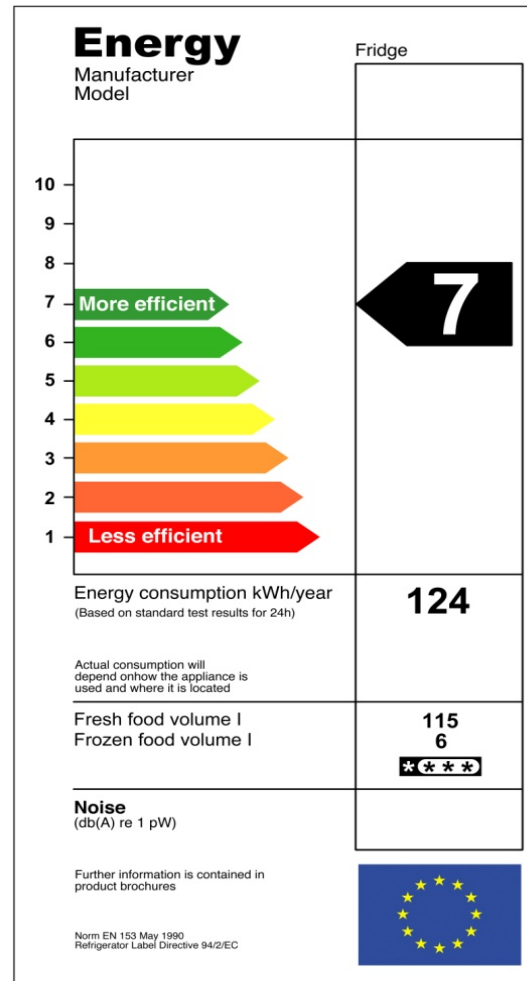
- When respondents were asked to identify the letter signifying the MOST energy efficient product there is clear evidence that they fully understand how the scale works.
- In four of the markets 97% of respondents selected the letter “A”. In two markets we had 98% select “A” and Denmark came out with the highest correct score of 99%
- Very few respondents in each market selected answers other than A.

Labels shown in Q3 – Q5

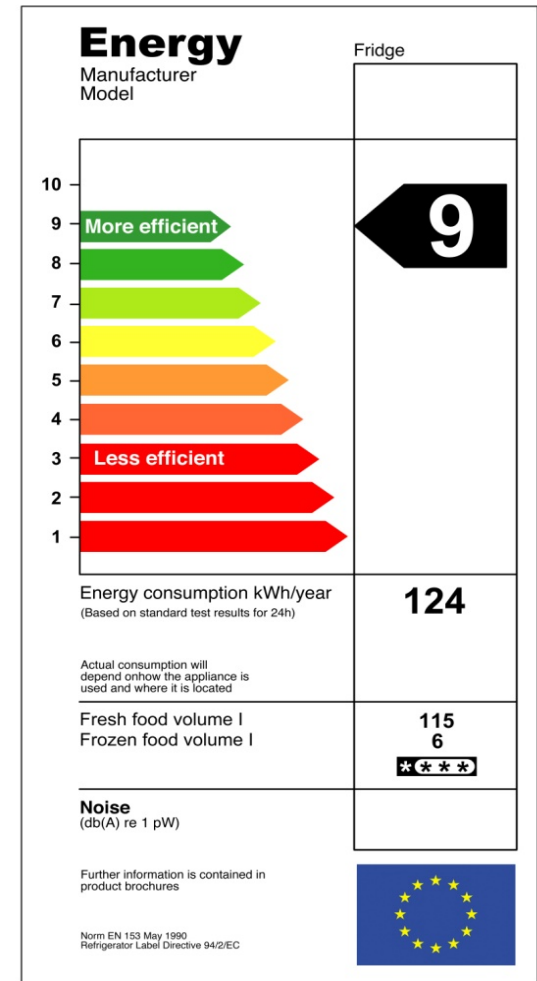
A – G Label



7 – 1 Label



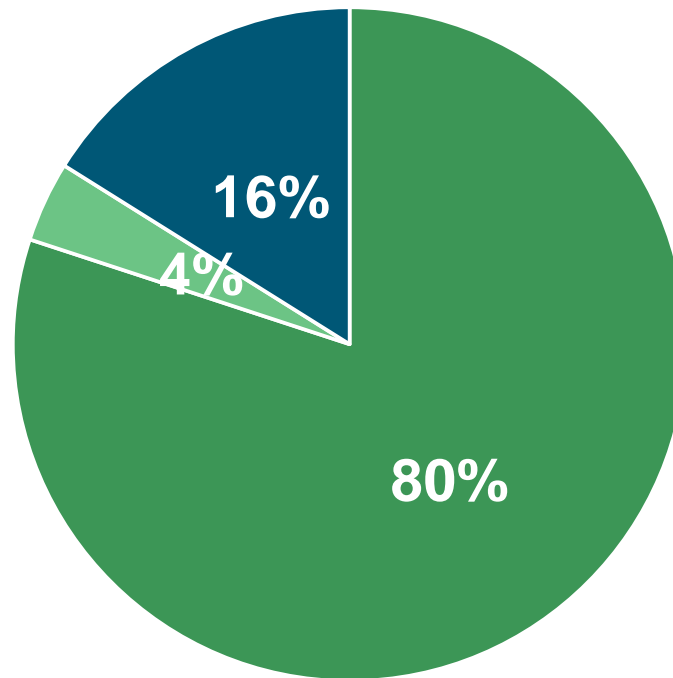
9 – 3 Label



Q3 A-G or 7-1 Label - GB

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

■ A-G ■ 7-1 ■ No Difference

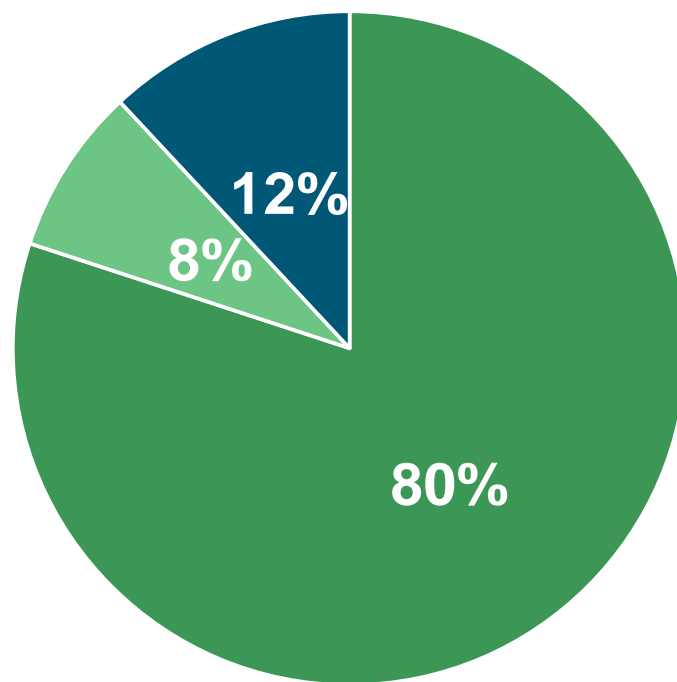


Base: 1,000 adults aged 16-64

Q3 A-G or 7-1 Label - Poland

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

■ A-G ■ 7-1 ■ No Difference

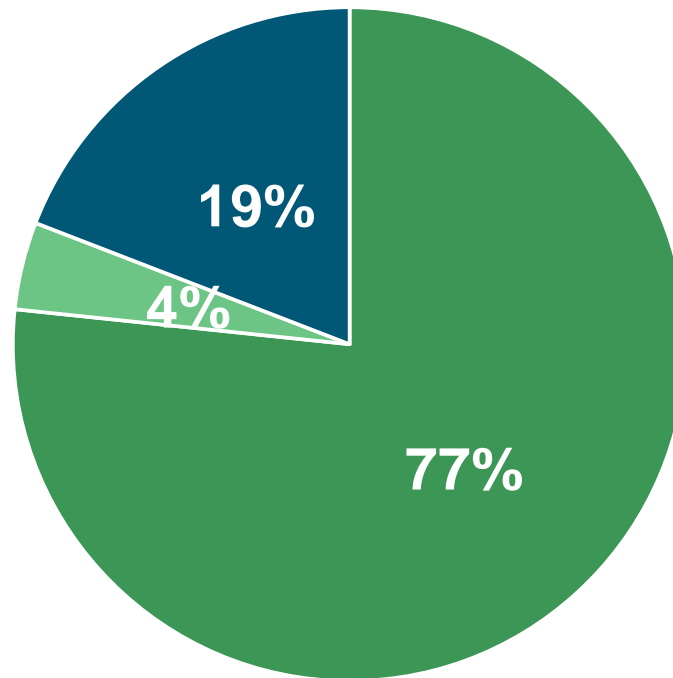


Base: 1,000 adults aged 16-59

Q3 A-G or 7-1 Label - Denmark

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

■ A-G ■ 7-1 ■ No Difference

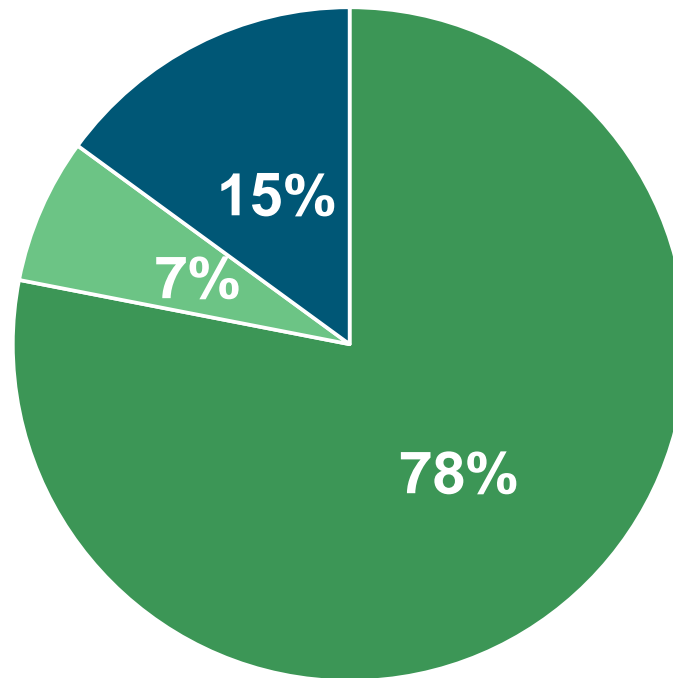


Base: 1,000 adults aged 16-64

Q3 A-G or 7-1 Label - Germany

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

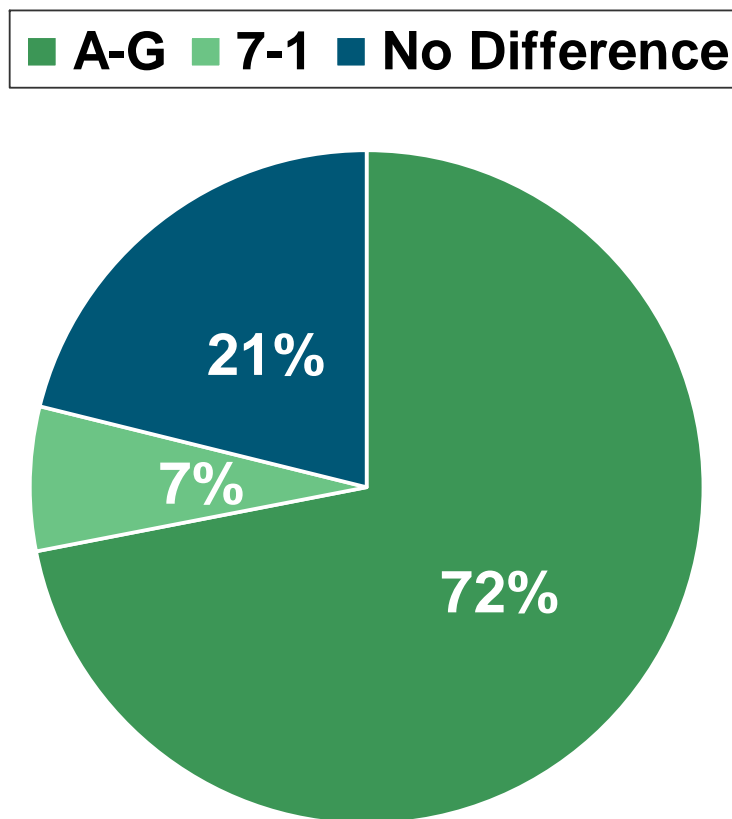
■ A-G ■ 7-1 ■ No Difference



Base: 1,000 adults aged 16-64

Q3 A-G or 7-1 Label - Netherlands

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

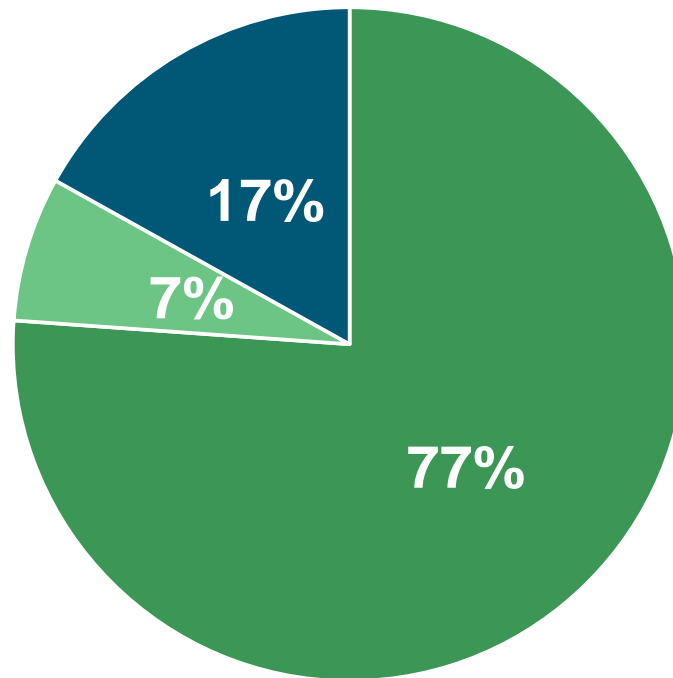


Base: 1,000 adults aged 16-64

Q3 A-G or 7-1 Label - France

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

■ A-G ■ 7-1 ■ No Difference

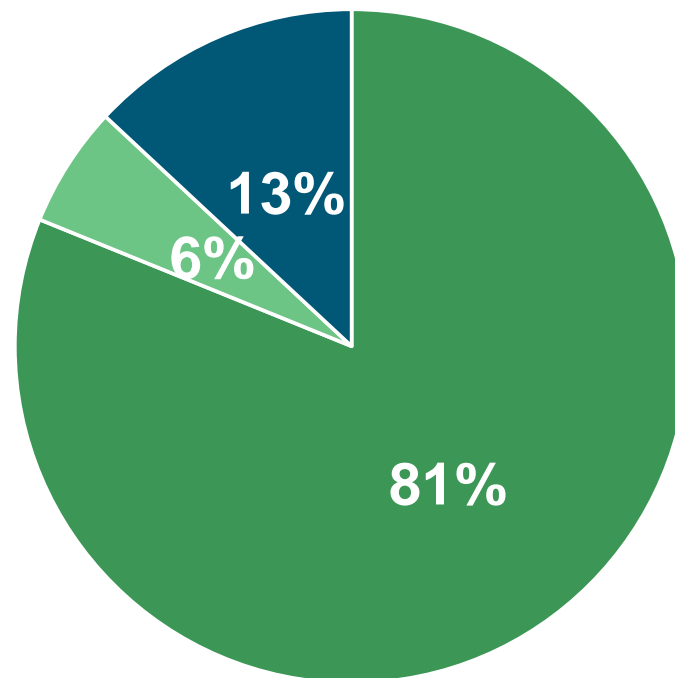


Base: 1,000 adults aged 16-64

Q3 A-G or 7-1 Label - Italy

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

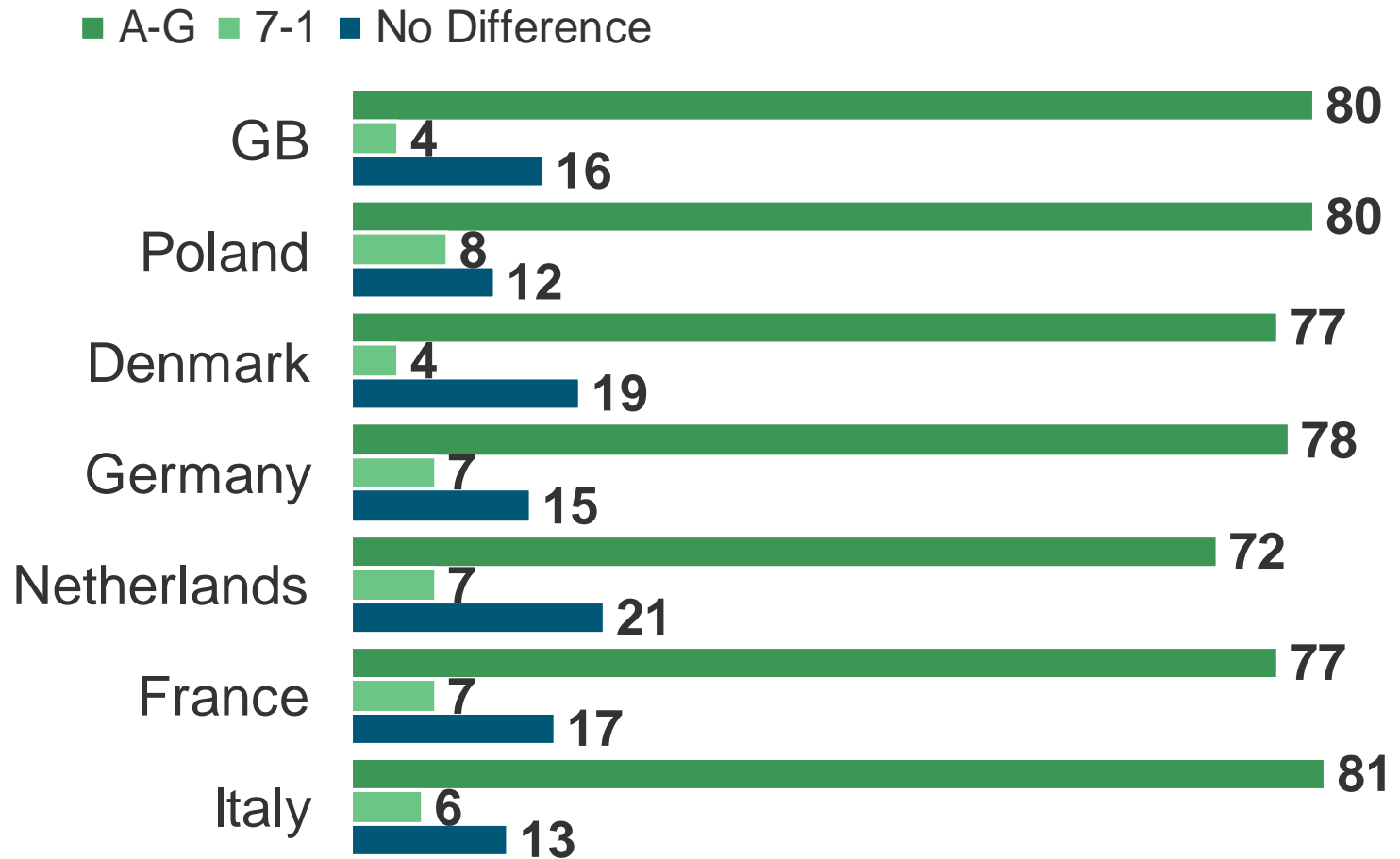
■ A-G ■ 7-1 ■ No Difference



Base: 1,000 adults aged 16-64

Q3 A-G or 7-1 Label - Summary

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”



Base: 1,000 adults in each market

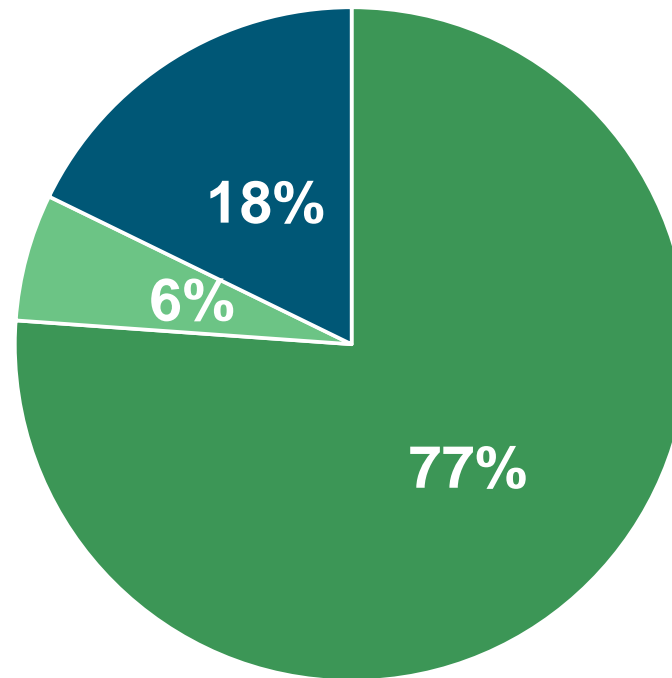
Q3 A-G or 7-1 Label - Summary

- Across all 7 markets the majority of respondents found A-G easier to understand than the 7-1 label
- The biggest difference in preference of A-G compared to 7-1 was in Great Britain. With 80% selecting A-G and just 4% opting for 7-1, a difference of 76 percentage points.
- The market with the greatest preference for the 7-1 label was Poland, however even then only 8% of the respondents found 7-1 easier to understand.
- Netherlands was the highest market stating there was “No difference” between the two labels with 1 in 5 respondents selecting this option
- 72% of respondents in the Netherlands chose A-G and that is significantly less than all the other markets

Q4 A-G or 9-3 Label - GB

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

■ A-G ■ 9-3 ■ No Difference

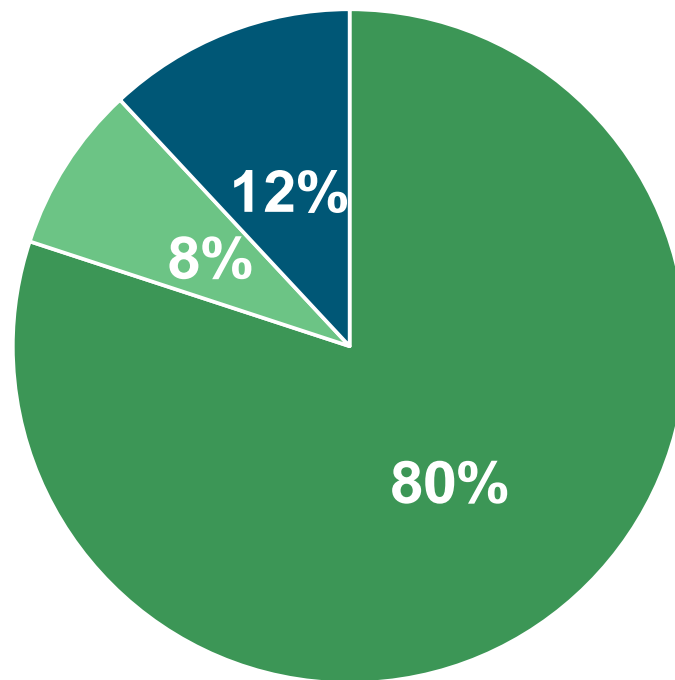


Base: 1,000 adults aged 16-64

Q4 A-G or 9-3 Label - Poland

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

■ A-G ■ 9-3 ■ No Difference

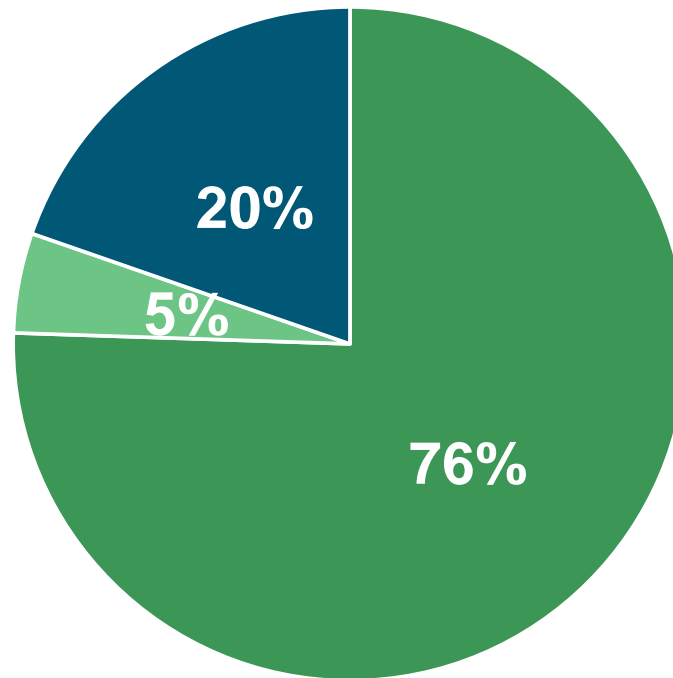


Base: 1,000 adults aged 16-59

Q4 A-G or 9-3 Label - Denmark

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

■ A-G ■ 9-3 ■ No Difference

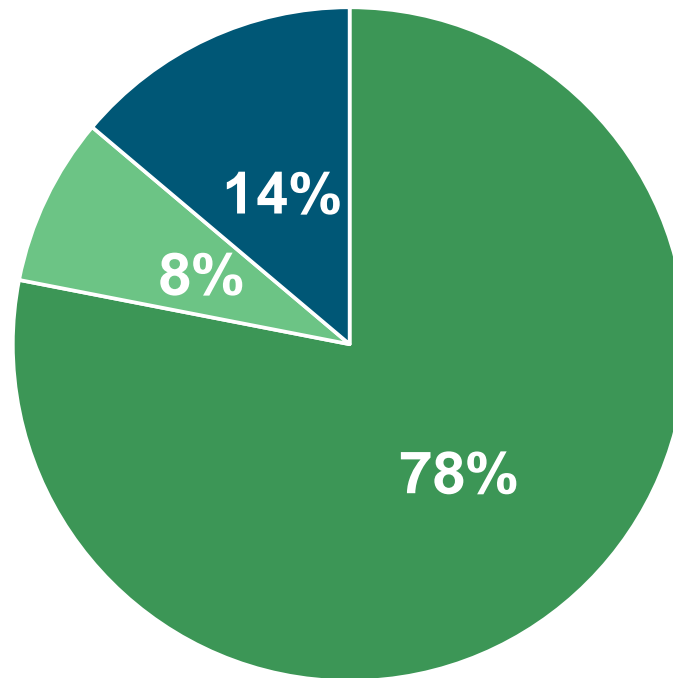


Base: 1,000 adults aged 16-64

Q4 A-G or 9-3 Label - Germany

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

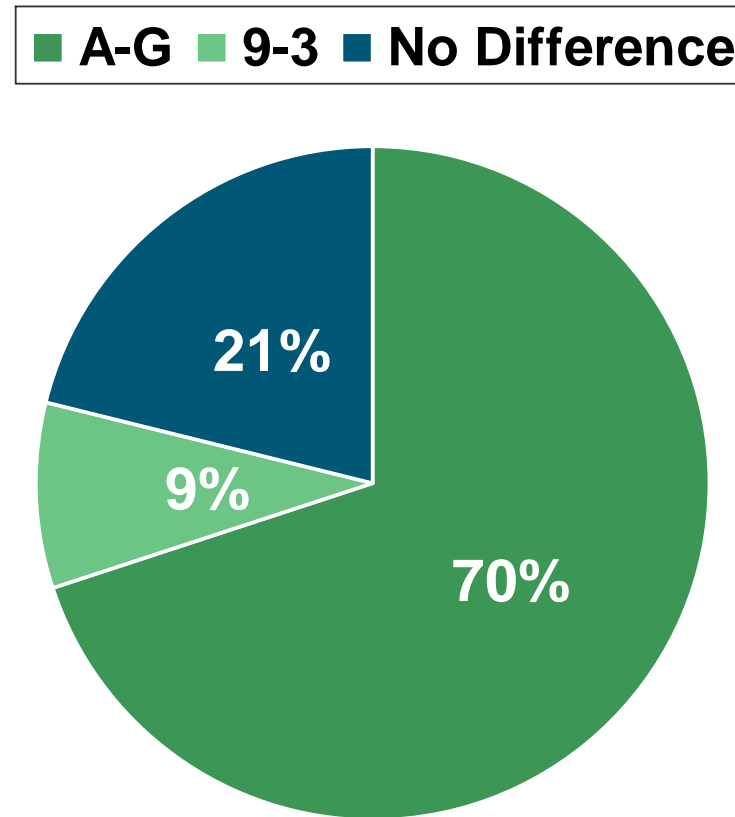
■ A-G ■ 9-3 ■ No Difference



Base: 1,000 adults aged 16-64

Q4 A-G or 9-3 Label - Netherlands

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

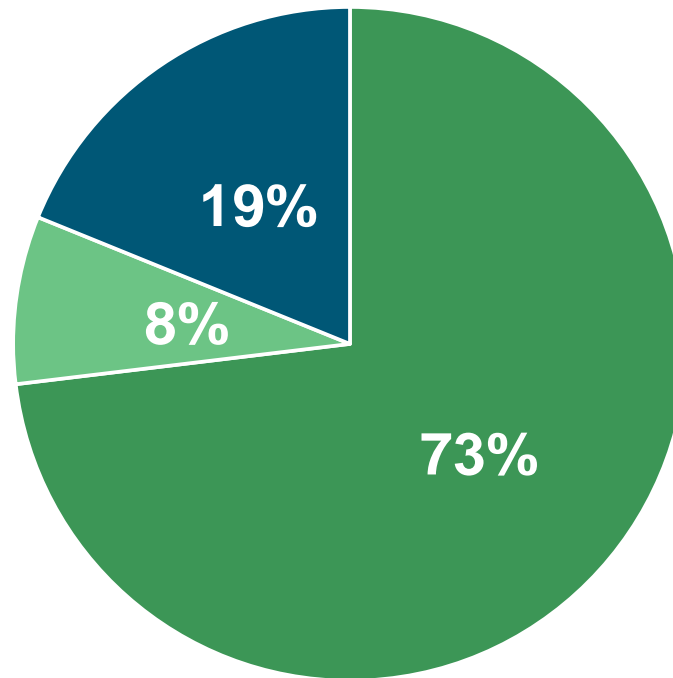


Base: 1,000 adults aged 16-64

Q4 A-G or 9-3 Label - France

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

■ A-G ■ 9-3 ■ No Difference

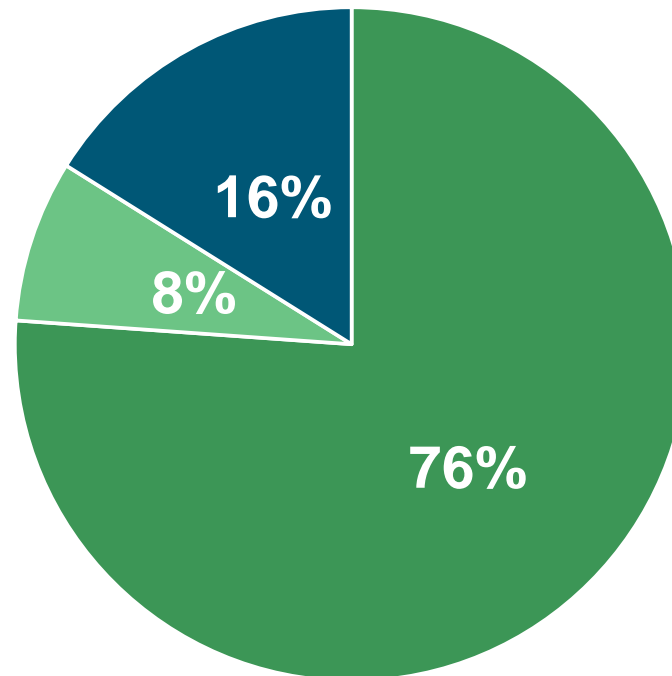


Base: 1,000 adults aged 16-64

Q4 A-G or 9-3 Label - Italy

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

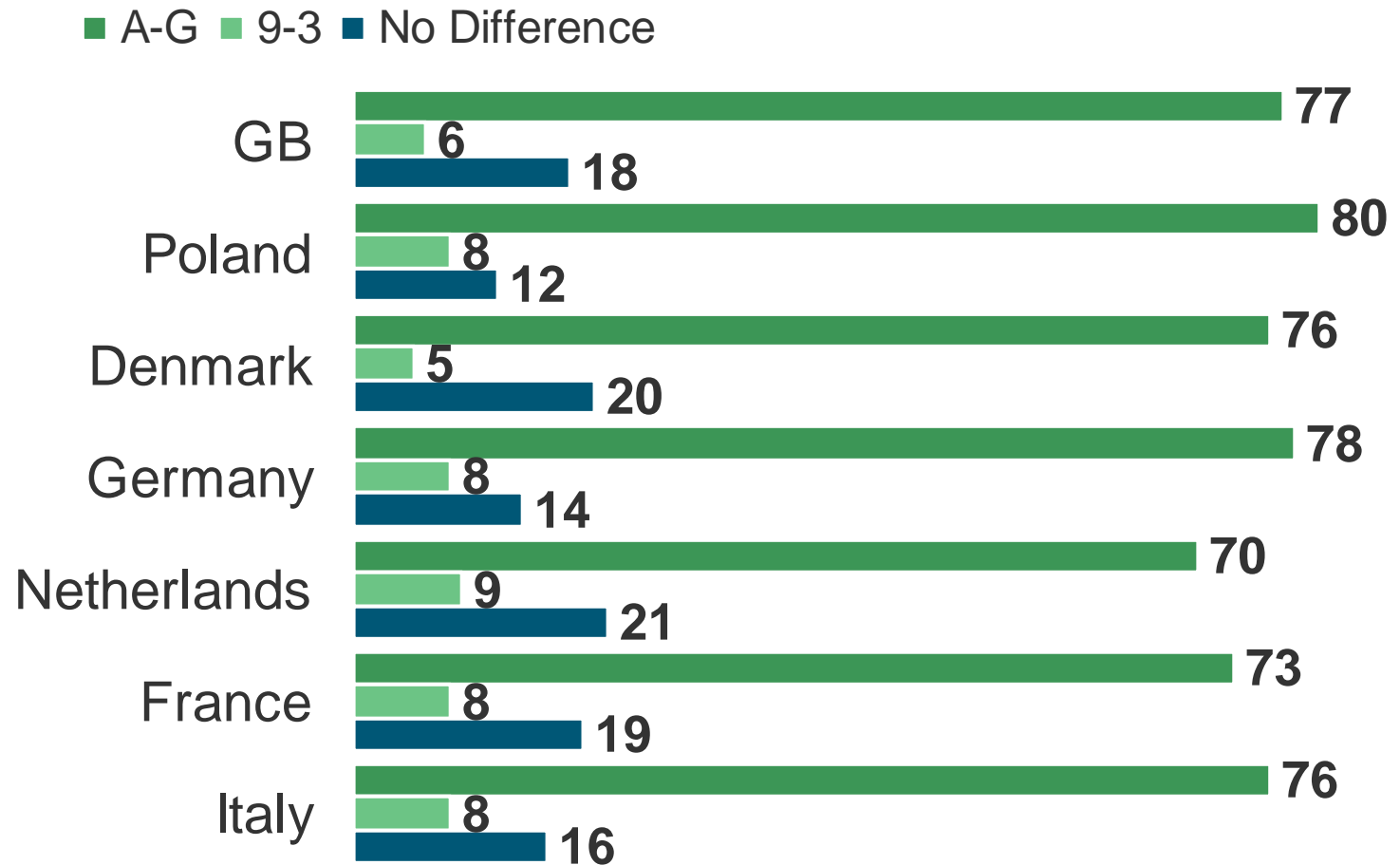
■ A-G ■ 9-3 ■ No Difference



Base: 1,000 adults aged 16-64

Q4 A-G or 9-3 Label - Summary

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”



Base: 1,000 adults in each market

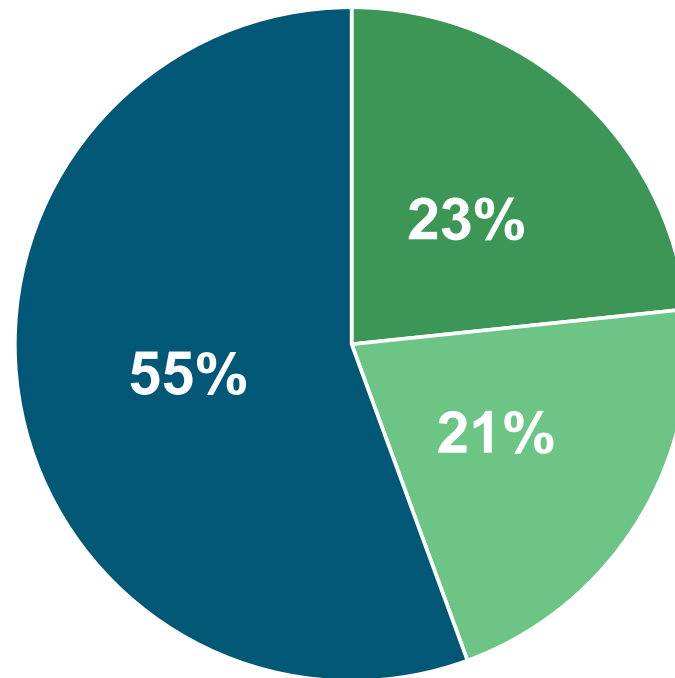
Q4 A-G or 9-3 Label - Summary

- When comparing A-G and 9-3 again the A-G label came out as being the easiest to understand in all markets
- This time Poland had the biggest difference in the preference for A-G compared to 9-3 with 80% selecting the former and just 8% opting for the latter, a difference of 72 percentage points
- Netherlands was again the market which gave the highest response for “No difference” with 21% choosing that option. They also gave the highest preference for the 9-3 label than any other market, however this was just 9% with four of the other markets scoring 8%.
- In Denmark 5% preferred 9-3 and that is significantly less than all the other markets (except GB with 6%)

Q5 7-1 or 9-3 Label - GB

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

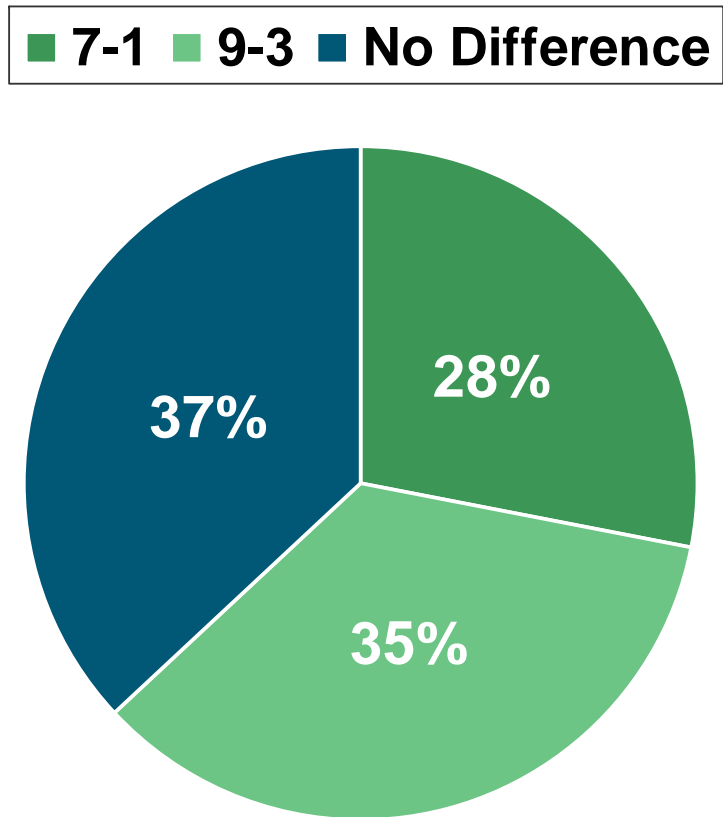
■ 7-1 ■ 9-3 ■ No Difference



Base: 1,000 adults aged 16-64

Q5 7-1 or 9-3 Label - Poland

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

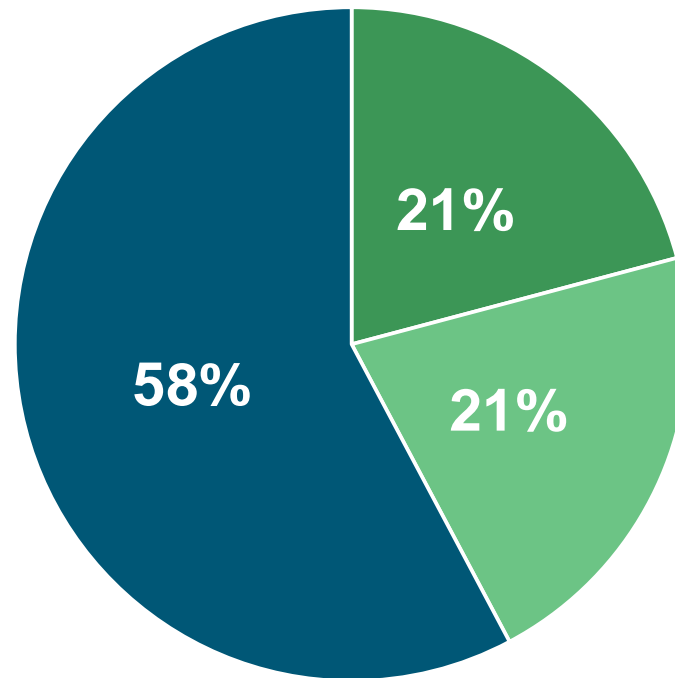


Base: 1,000 adults aged 16-59

Q5 7-1 or 9-3 Label - Denmark

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

■ 7-1 ■ 9-3 ■ No Difference

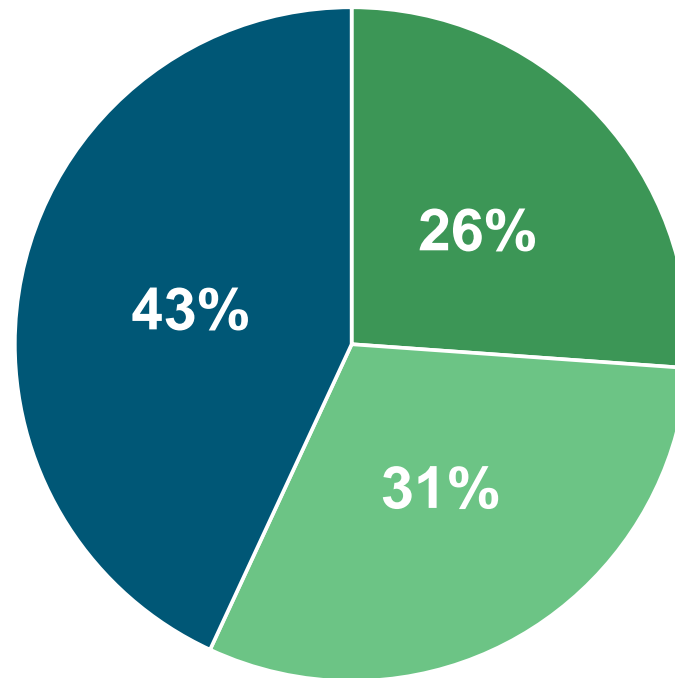


Base: 1,000 adults aged 16-64

Q5 7-1 or 9-3 Label - Germany

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

■ 7-1 ■ 9-3 ■ No Difference

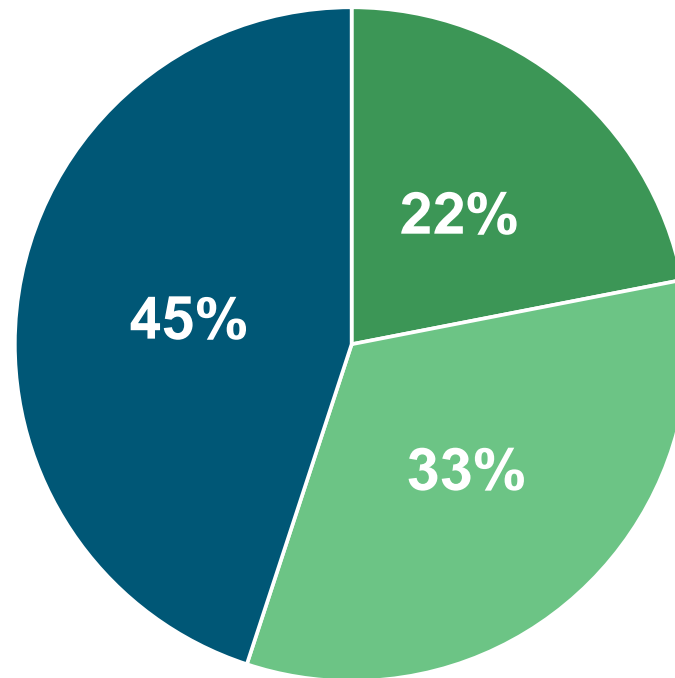


Base: 1,000 adults aged 16-64

Q5 7-1 or 9-3 Label - Netherlands

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

■ 7-1 ■ 9-3 ■ No Difference

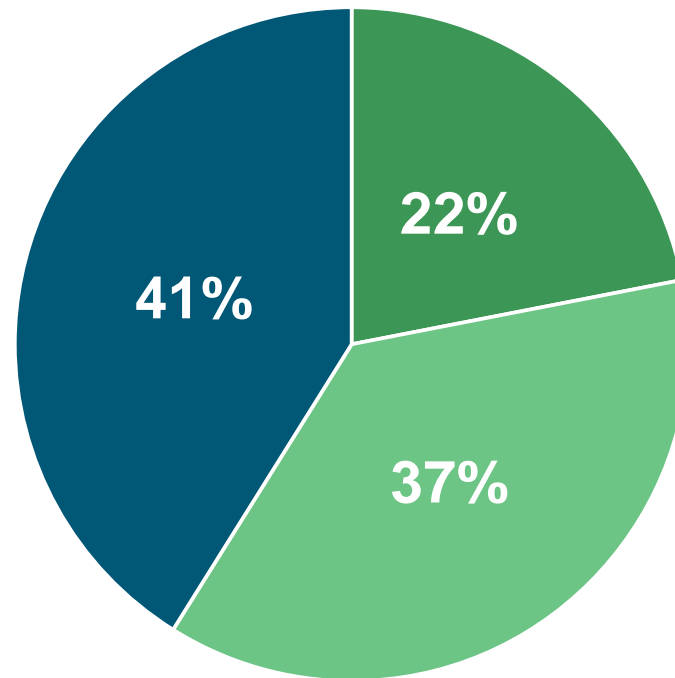


Base: 1,000 adults aged 16-64

Q5 7-1 or 9-3 Label - France

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

■ 7-1 ■ 9-3 ■ No Difference

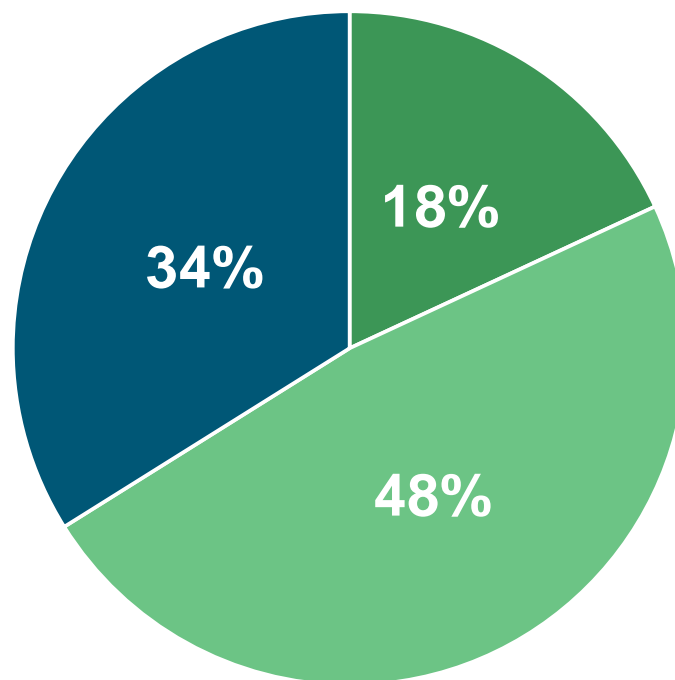


Base: 1,000 adults aged 16-64

Q5 7-1 or 9-3 Label - Italy

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”

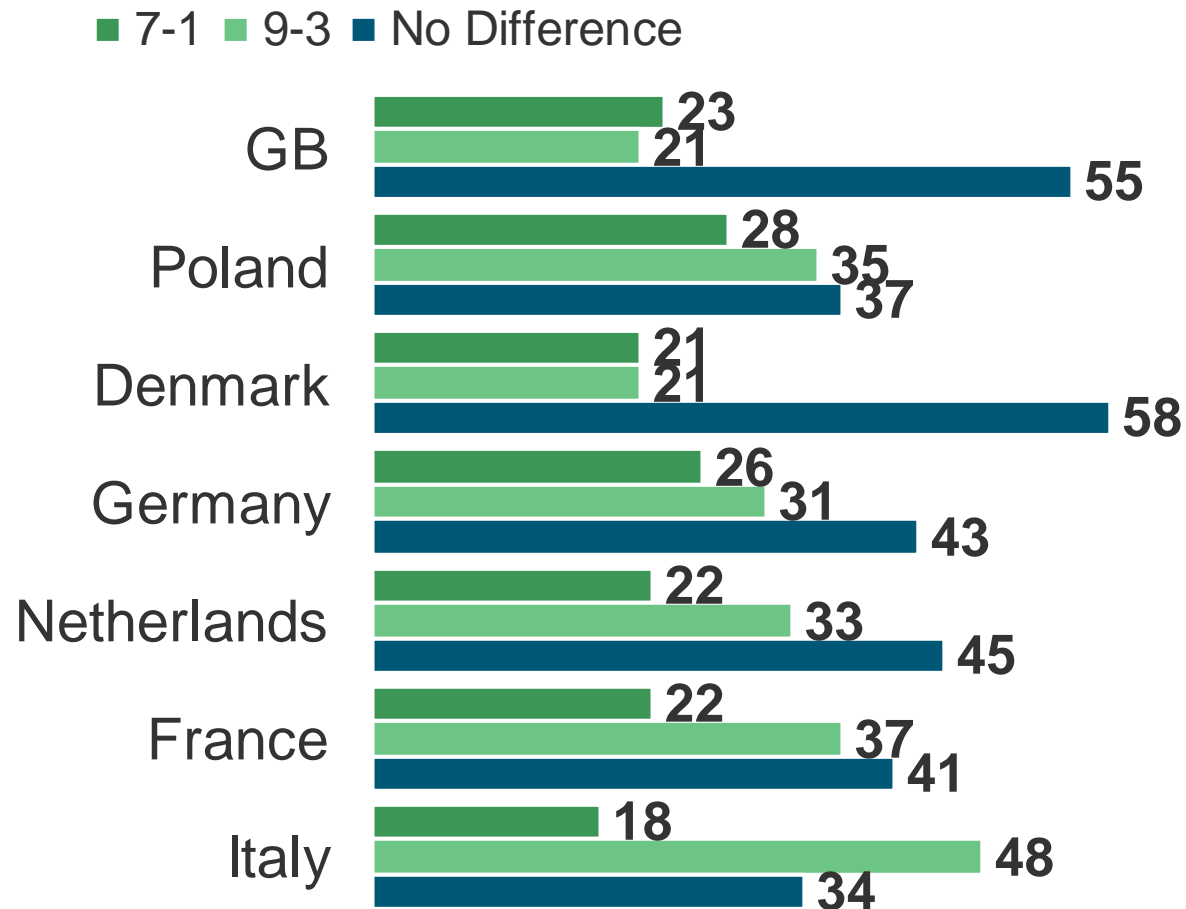
■ 7-1 ■ 9-3 ■ No Difference



Base: 1,000 adults aged 16-64

Q5 7-1 or 9-3 Label – Summary

“If you were buying an energy efficient fridge, which of the following labels would be easiest to understand?”



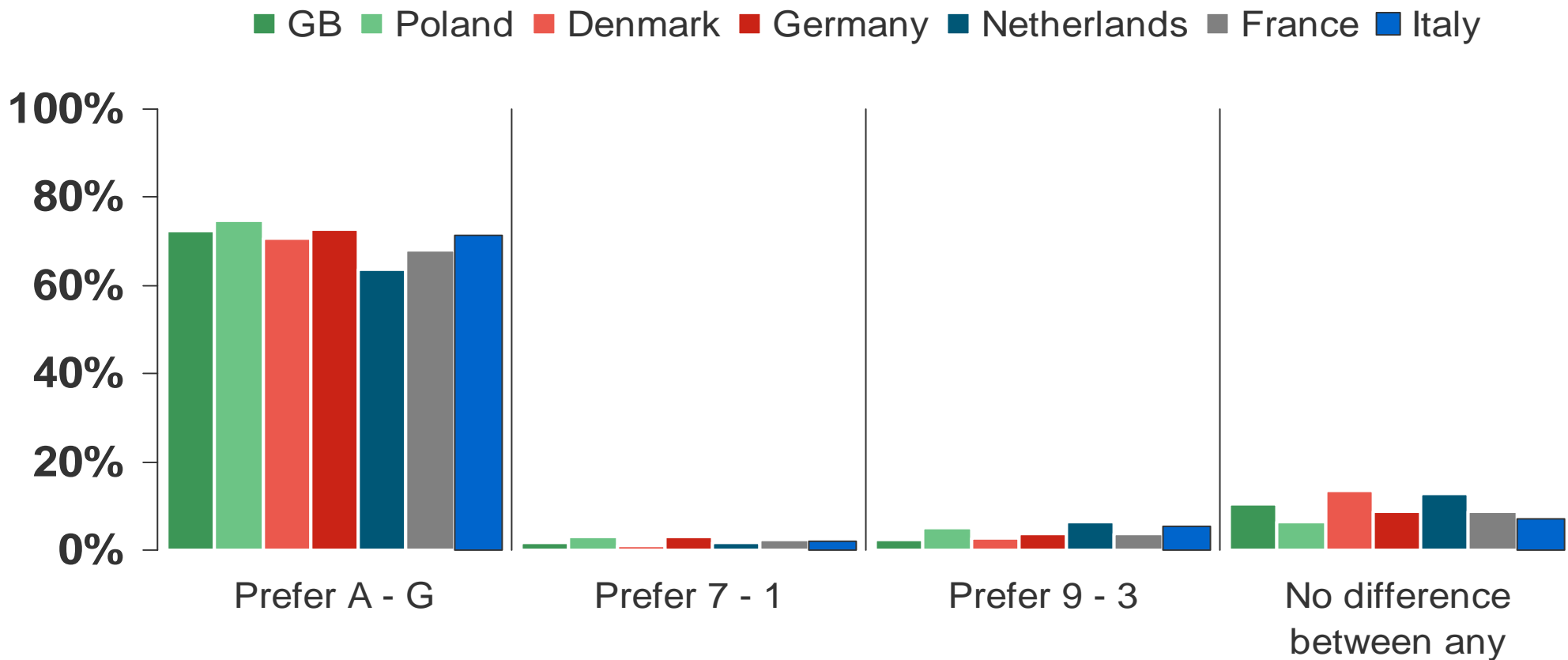
Base: 1,000 adults in each market

Q5 7-1 or 9-3 Label - Summary

- In six out of seven markets the majority of respondents decided there was “No difference” between 7-1 and 9-3. The Italians were the only market where the majority did opt for one of the labels, 48% selecting 9-3
- The markets where there is a significant difference in favour of 9-3 were Poland, Germany, Netherlands, France and Italy.
- The only market where 7-1 performed better than 9-3 was GB but the difference was not significant
- Denmark was completely split with 21% selecting 7-1, another 21% selecting 9-3 and the remaining 58% saying there was “No difference”.

Easiest to understand - TOTAL

This chart shows the percentage of respondents who selected A-G at both Q3 and Q4, those selecting 7-1 at both Q3 and Q5, 9-3 at both Q4 and Q5 and those selecting “No difference” at all of Q3, Q4 and Q5



Base: 1,000 adults in each market

Easiest to understand - SUMMARY

- Those saying that A-G is easier to understand at BOTH Q3 and Q4 is clearly the most popular option across all markets
- 75% of the Polish respondents selected this label at both questions and the Netherlands was the country with the fewest amount opting for the A-G label both times, but even then it was 64% of the sample so still a popular choice in that country.
- The 9-3 label was selected at both questions more frequently than the 7-1 label, but there were still more respondents in each market saying there was “No difference” between all the labels than there were choosing these two labels both times.
- Main conclusion is that the A-G label is the easiest to understand across all markets and the overwhelming majority in each market correctly identified the “A” as the most energy efficient product