Department of the Environment and Energy.

Light bulb labelling consumer study.

1st March 2017

Prepared for the Department of the Environment and Energy on behalf of the E3 Program.

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colmar brunton.

Contents.

Background.

Research background.

There is currently a very broad range of packaging styles for light bulbs in Australia and New Zealand, and all display a variety of information, much of which is unlikely to help consumers make comparisons on the most energy efficient choice for their home.

The overarching purpose of this study is to determine whether a consistent label on light bulb packaging would assist consumers in purchasing the most efficient and appropriate light bulb for their application. Or, alternatively, if product marking requirements (with specific information, but without specifying the design) on packaging would be just as effective as a standardised label.

Specific Objectives for Phase One:

1. What role labelling, specifically, currently plays in the purchase decision

2. The ease with which information is identified on light bulb packaging.

3. Whether labelling information is likely to encourage shoppers to purchase energy efficient light bulbs over standard bulbs.

Methodology.

Methodology.

The Quantitative phase of research was conducted between 7th November & 15th November 2016.

Stage one

Phase one
Scoping and planning

Create a shared vision for the research, engaging all relevant decision-makers in the process. Confirm the research objectives, research design, research timings and project team.

Phase two
Contextual scan

Review the recent CHOICE and I-View research on factors which influence lighting purchasing decisions, and current light bulb labelling advice for shoppers in Australia and internationally for shoppers. The findings from this stage will inform the qualitative discussion guide and the final report.

Phase three
Quantitative survey

Design an online survey with n=800, nat rep across NZ and AU, and prepare a short report on the consumer appetite for labelling recommending whether to move to stage two.

We are here.

Stage two

Phase four
Qualitative discussions

Qualitative research in Melbourne, Sydney and Auckland. In total we will run either 6 or 12 qualitative discussion groups, and 6 paired in-depth shopper experience interviews.

Phase five
Analysis and reporting

Analysing the findings from the qualitative research and bringing these together with the reflections from the contextual scan into a full draft and final report

Who we spoke to...

Quotas were set on age, gender and location.

	Australia		New Zealand	
	Target	Count	Target	Achieved
	N=400	**N=436**	N=400	**N=414**
Male	n=200	N=225	n=200	n=200
Female	n=200	n=211	n=200	n=213
>34 years	n=100	n=117	n=100	n=129
35 – 54 years	n=100	n=184	n=100	n=168
55 + years	n=100	n=135	n=100	n=117
Location Splits	**NSW** n=120	n=125	**North Island** n=300	n=292
	VIC n=100	n=125	**Metro North Island** n=200	n=191
	QLD n=80	n=81	**South Island** n=100	n=122
	SA/NT n=35	n=32	**Metro South Island** n=75	n=76
	WA n=45	n=53		
	TAS n=10	n=10		
	ACT n=10	n=10		

Findings.

Key Findings.

What role do labels play in the purchase decision?

1. Over nine in ten Australian and New Zealand consumers consider purchasing energy efficiency globes to be important to them, sentiments are stronger in Australia than New Zealand. While three quarters of consumers consider themselves to be well informed about the range of light bulb options available. The decision making process in store is very short suggesting not all factors are taken into account.

2. Among both Australians and New Zealanders, cost efficiency, necessity for a particular light fitting and habit are the most common factors in purchase decisions. Energy efficiency is a main priority when considering CFL and LED bulbs, as well as LED downlights.

3. Overall, Australians are more likely than New Zealanders to replace their light bulbs twice per year or more. The divide is most pronounced for incandescent decorative bulbs, which are changed substantially more often by Australians. The most frequently replaced across both countries are traditional and candle/fancy round incandescent bulbs, while the least often replaced are the LED and linear fluorescent tube bulbs.

4. Participants judge value for money relatively consistently, regardless of country. This is perceived to be best in LED bulbs and linear fluorescent tubes in accordance with their low rate of bulb change. New Zealanders, however, predominantly see traditional incandescent GLS bulbs to be cost efficient despite reporting them to be the most commonly replaced. On the other hand, incandescent decorative lights and halogen downlights are seen as providing poor value for money by many participants.

5. Given hypothetical price points for a variety of bulbs, participants indicate that they would be most likely to purchase traditional incandescent GLS bulbs (priced at $1 each) and halogen bulbs (priced at $3 each). Conversely, fewer are willing to buy LED bulbs or downlights (priced at $10 each). It would be useful in the qualitative research to further explore the price thresholds at which specific types of bulbs become too expensive.

Key Findings.

Is labelling information likely to encourage shoppers to purchase energy efficient light bulbs over standard bulbs?

6. In purchasing a replacement light bulb, the most prominent deciding factors across both groups are price, familiarity, and quality. Nine in ten Australians consider it to be important for light bulb packaging to communicate the power (W), the light omitted and the expected lifespan of the light bulb (88%, 86% and 85% respectively). Four fifths of Australians also considered it important for the energy efficiency and claimed incandescent equivalence to be printed on packaging (81% and 80% respectively). Three quarters would also like to see the estimated annual electricity cost reflected on packaging (76%).

7. Australians and New Zealanders show variation in the types of bulbs they intend to install when another needs replacement. More Australian than New Zealand respondents indicate that they would choose CFL bulbs and halogen bulbs, while New Zealanders show a preference for traditional incandescent and LED bulbs. Perhaps a reflection of the market, Candle/fancy round/decorative incandescent bulbs and halogen downlights are not often desired as replacements, but are still more popular among Australians than New Zealanders.

8. When considering how important certain types of information are on light bulb packaging, energy consumption of the globe, the light output and the expected lifespan of the globe are the most important inclusions across by New Zealand and Australia. While having a dimming feature and compatibility is less important for purchasers in either country.

The ease with which information is identified on light bulb packaging

9. When testing the labels for clear communication of energy efficiency we find that preference is mixed. Label B is preferred by three in ten, however a quarter prefer Label D and a fifth prefer Label C. When reflecting on behaviour a high proportion believe most of the Labels would influence their behaviour, however only two thirds feel this way about the most technical design of Label E. See page 80 for an introduction to each label tested.

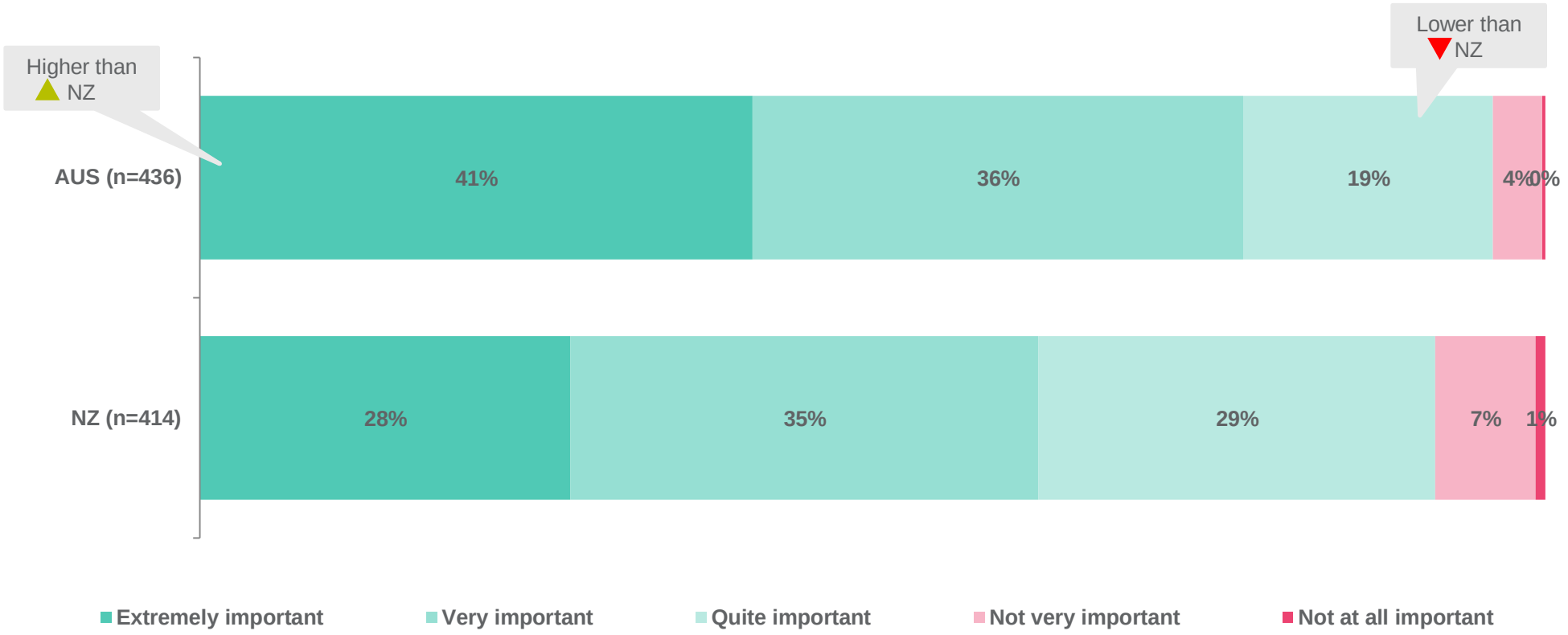
10. When testing the labels for clear communication of energy saving AND cost saving we find that the majority prefer label D ‘Lighting Facts’, three quarters of both Australians and New Zealanders believe this label would influence their decision to purchase a light bulb.

Light Bulb Purchase Behaviour.

Energy Efficiency is of high importance to Australian and New Zealand consumers.

It is of greater significance for Australian consumers to have energy efficient light bulbs than New Zealanders.

Energy efficient light bulbs are significantly more important to consumers that currently buy them.



▲ Significantly HIGHER compared to total at 95% confidence.

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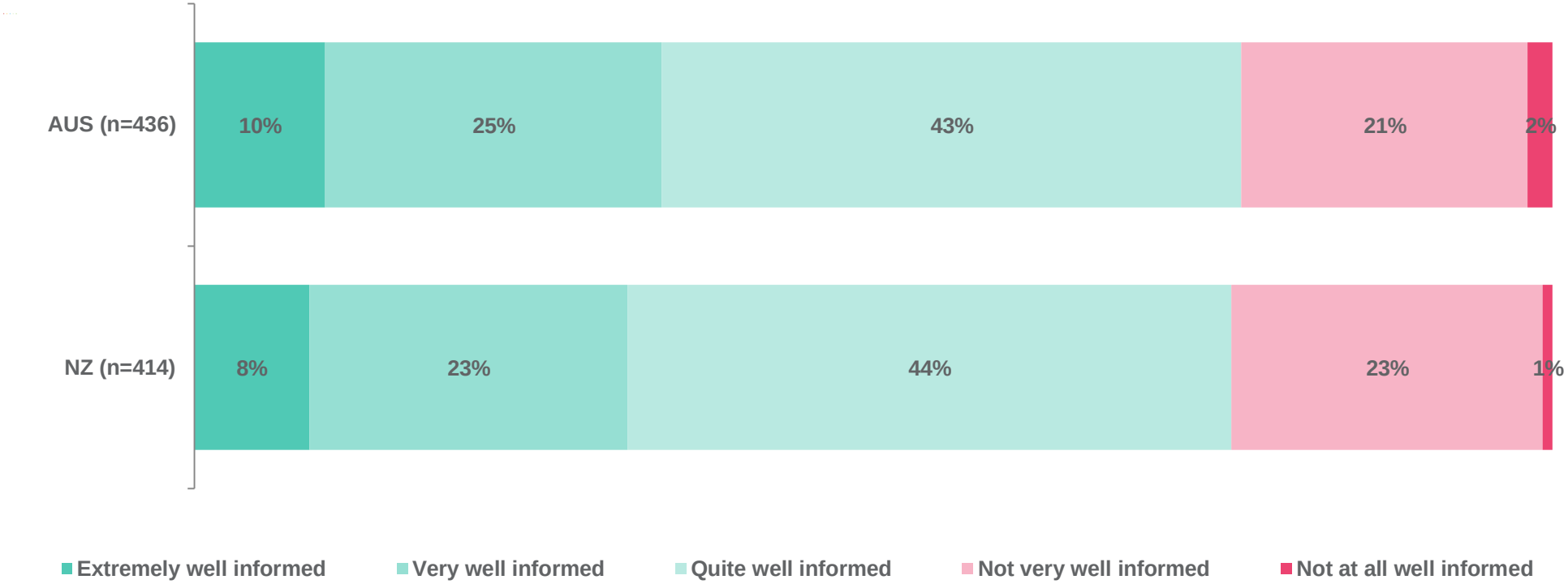
Q1. How important is it to you that your light bulbs are energy efficient?

Base: All respondents

The majority of AUS and NZ consumers feel well informed about the light bulb options available.

Consumers **currently purchasing** energy efficient light bulbs feel significantly more well informed than buyers that purchase energy efficient light bulb less frequently.



▲ Significantly HIGHER compared to total at 95% confidence.

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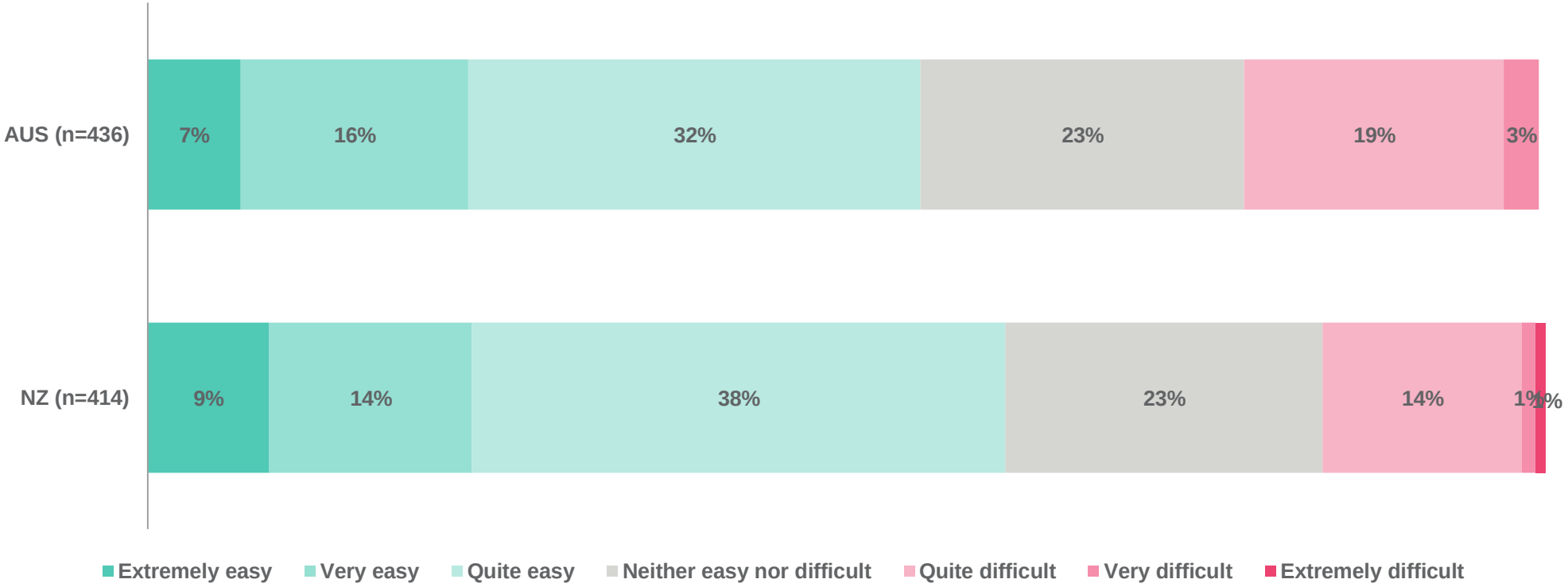
Q2. How well informed do you feel about the light bulb options available to you?

Base: All respondents

On the whole, Australian and New Zealand consumers find the light purchasing process quite easy.

Three fifths of both Australian and New Zealand consumers consider the process of choosing a light bulb to be at least quite easy (61% NZ and 55% AU).

While one in six New Zealand consumers find the process to be at least quite difficult and one fifth of Australian consumers feel the same (21%)



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Q8 How easy or difficult do you find the process of choosing a light bulb?

Base: All respondents

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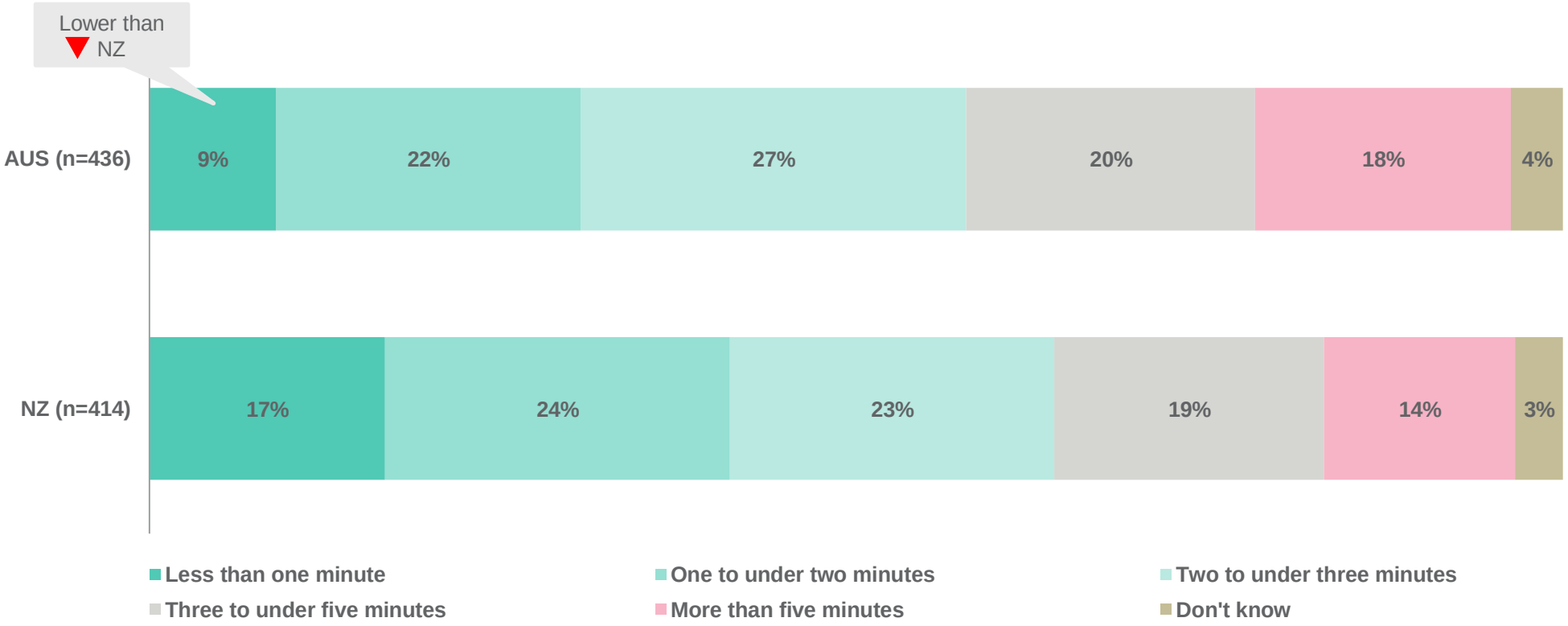
A third of AUS consumers take under two minutes to choose their light bulbs.

Australian consumers take more time reviewing light bulb options prior to purchasing a light bulb compared to New Zealanders.



▲ Significantly HIGHER compared to total at 95% confidence.

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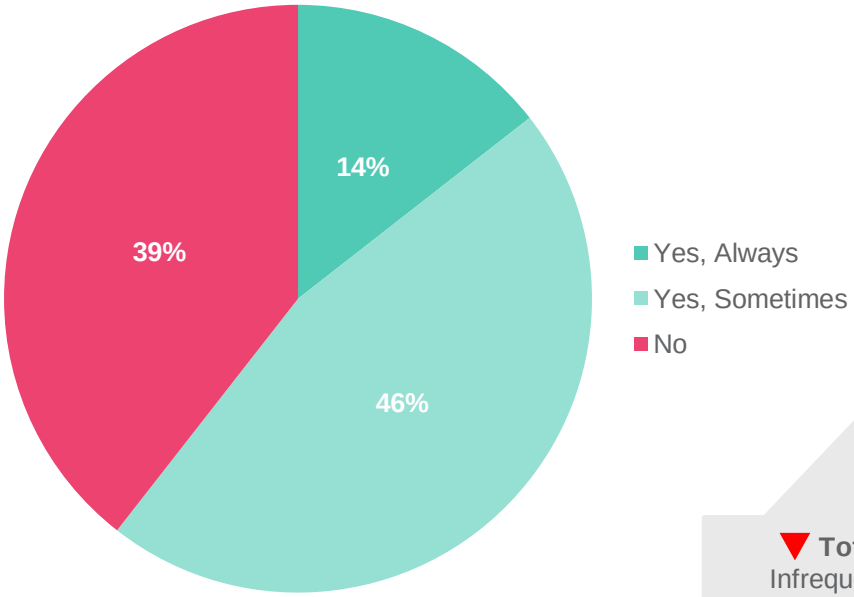
Q9.Generally speaking, how much time would you spend reviewing the options and choosing a light bulb?

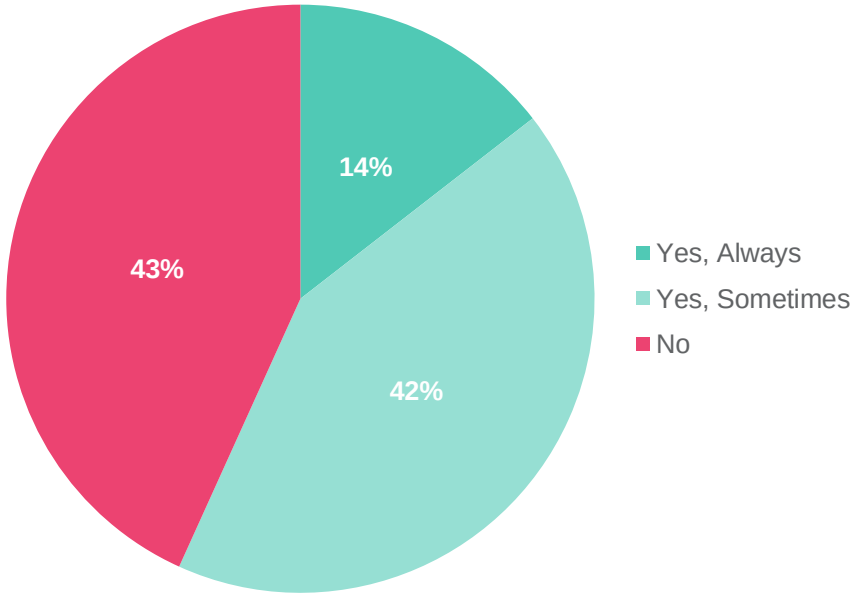
Base: All respondents

Many Australians and New Zealanders research the type of light bulb they are going to purchase before they leave the house, however two fifths conduct no research at all prior to heading to the store.

AUS (n=436)



NZ (n=414)



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▼ **Total Base**
Infrequent light bulb consumers are significantly less likely to conduct any research before leaving the house

Q10 Do you seek out information/conduct research on the type of light bulb you need before you leave home?

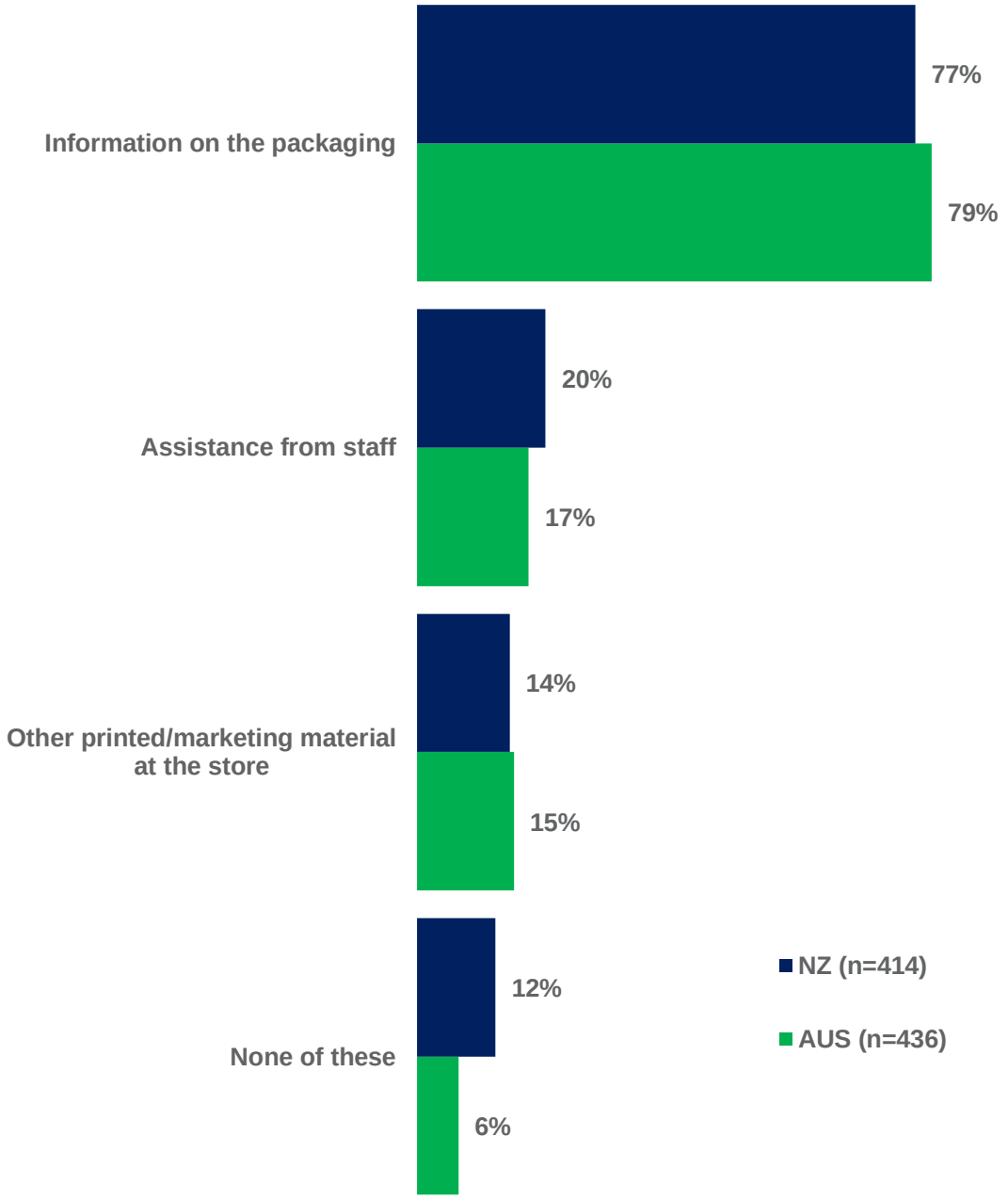
Base: All respondents

Purchasing Information & Importance.

Information displayed on the packaging is key for the purchasing decision.

A fifth of purchasers seek advice from staff as they make their purchase.

Australians and New Zealanders use similar information to make their light bulb purchases.



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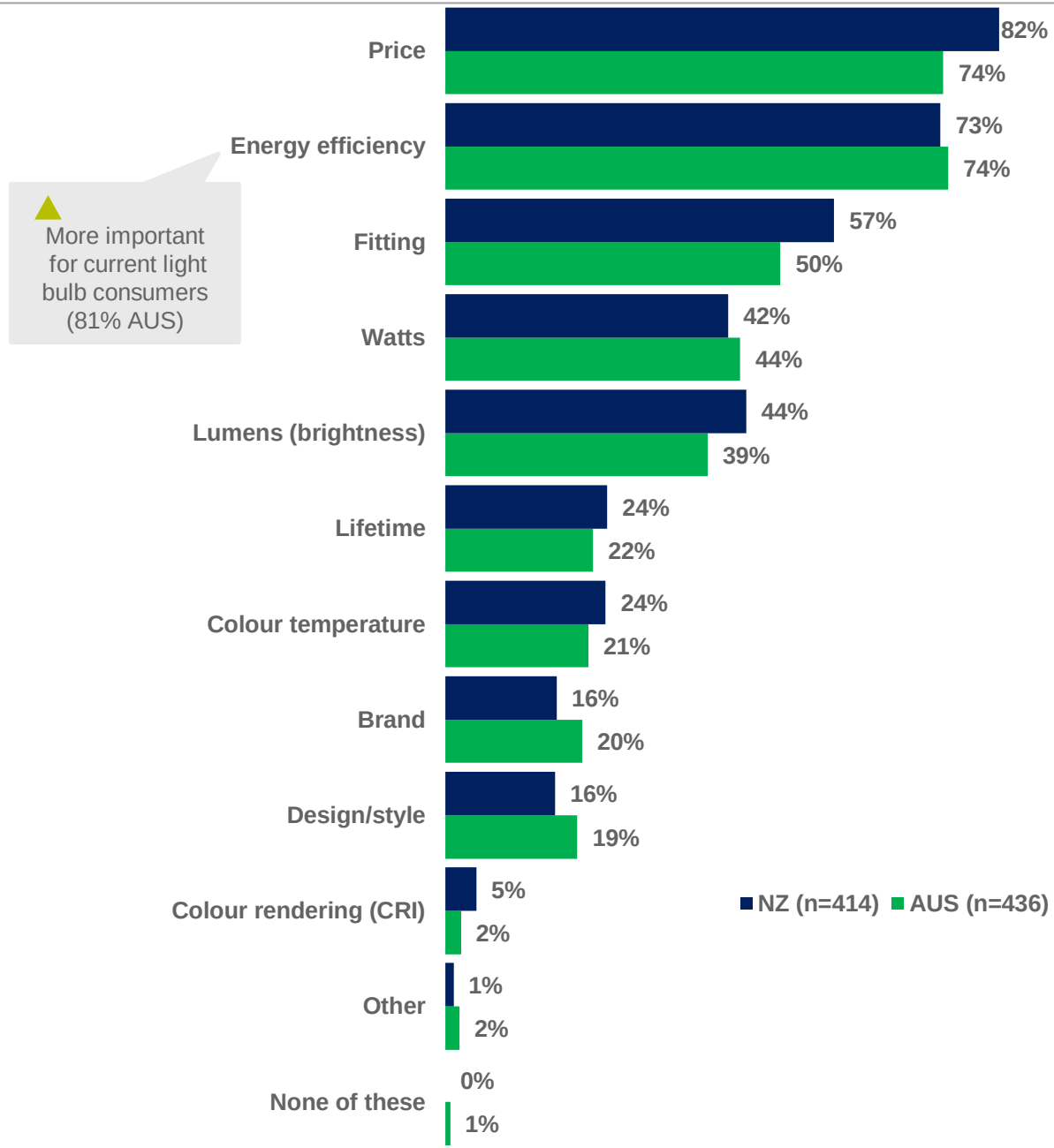
Q11 What information do you base your purchasing decision on?

Base: All respondents

Energy efficiency and price are the key attributes that purchasers believe to influence their decision.

Energy efficiency is significantly more important to consumers who always buy energy efficient light bulbs, while in New Zealand specifically price is the most important driver in light bulb choice for those who sometimes consider this option.



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Q12 Which of the following, if any, is important to you when choosing a light bulb?

Base: All respondents

Please Note: Responses under 2% not shown

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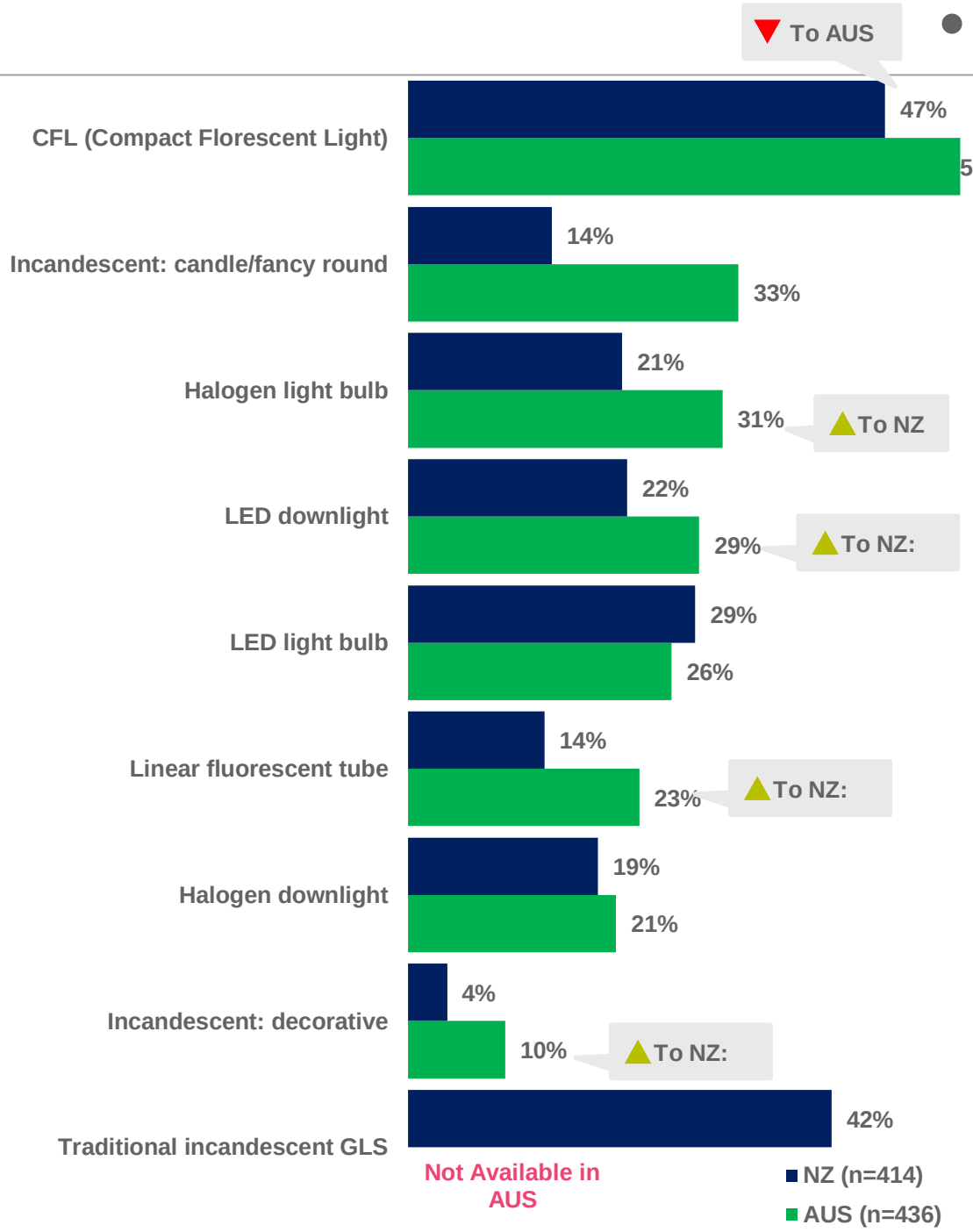
What is Purchased.

Australian consumers buy a wider range of globes compared to New Zealand.

CFLs are the most commonly purchased light bulbs in Australia and New Zealand. However Traditional Incandescent GLS remaining popular with two fifths of New Zealanders.

Australians are significantly more likely to purchase halogen light bulbs, LED downlights, linear fluorescent tubes and decorative incandescent globes than consumers in New Zealand. As traditional incandescents remain on the market in NZ, demand for halogen light bulbs is low as the product is not readily available.



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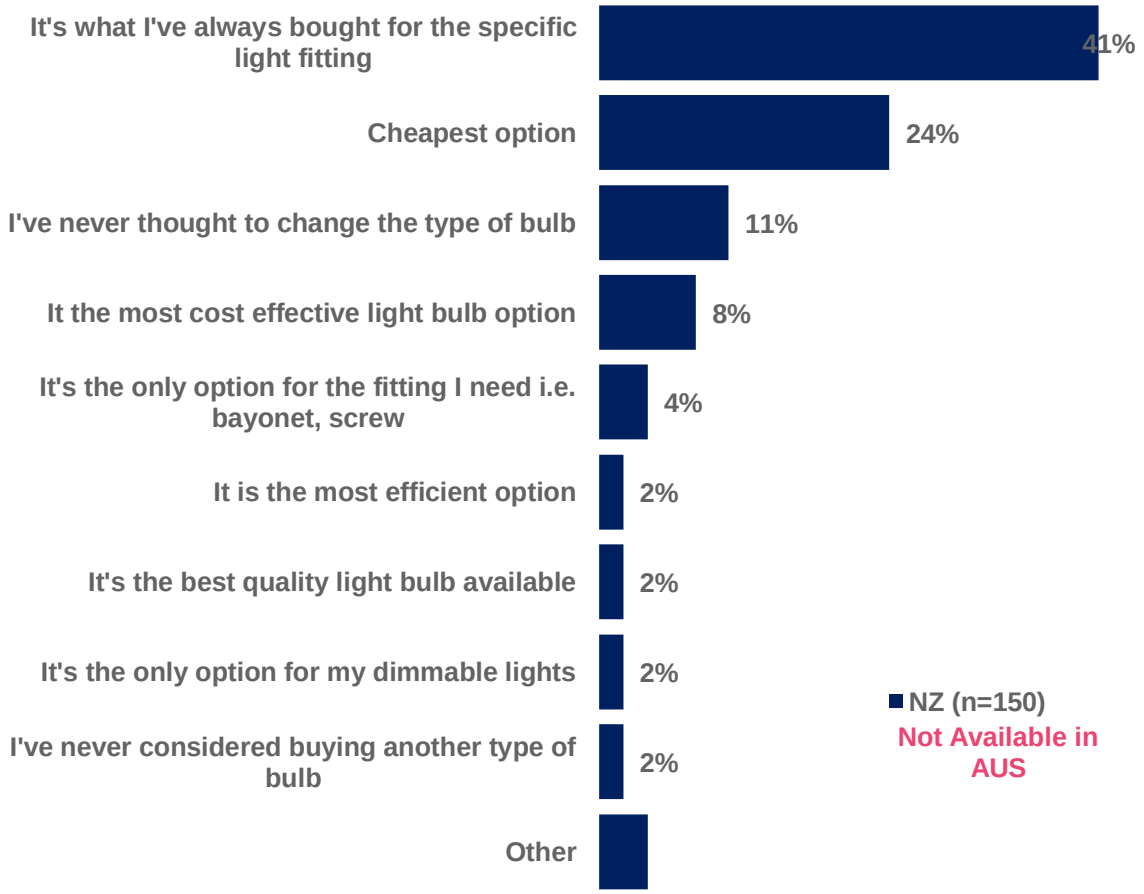
Q13. Which of the following types of light bulbs do you buy for use in your home?

Why Purchase?

Specific light fitting requirements are the most common reason New Zealanders purchase incandescent GLS.

Two fifths of New Zealanders purchase traditional incandescent GLS out of habit, as it is what they have always bought (41%).

One quarter make this choice because they are the cheapest option available (24%) and one in ten have never considered switching globe type (11%).



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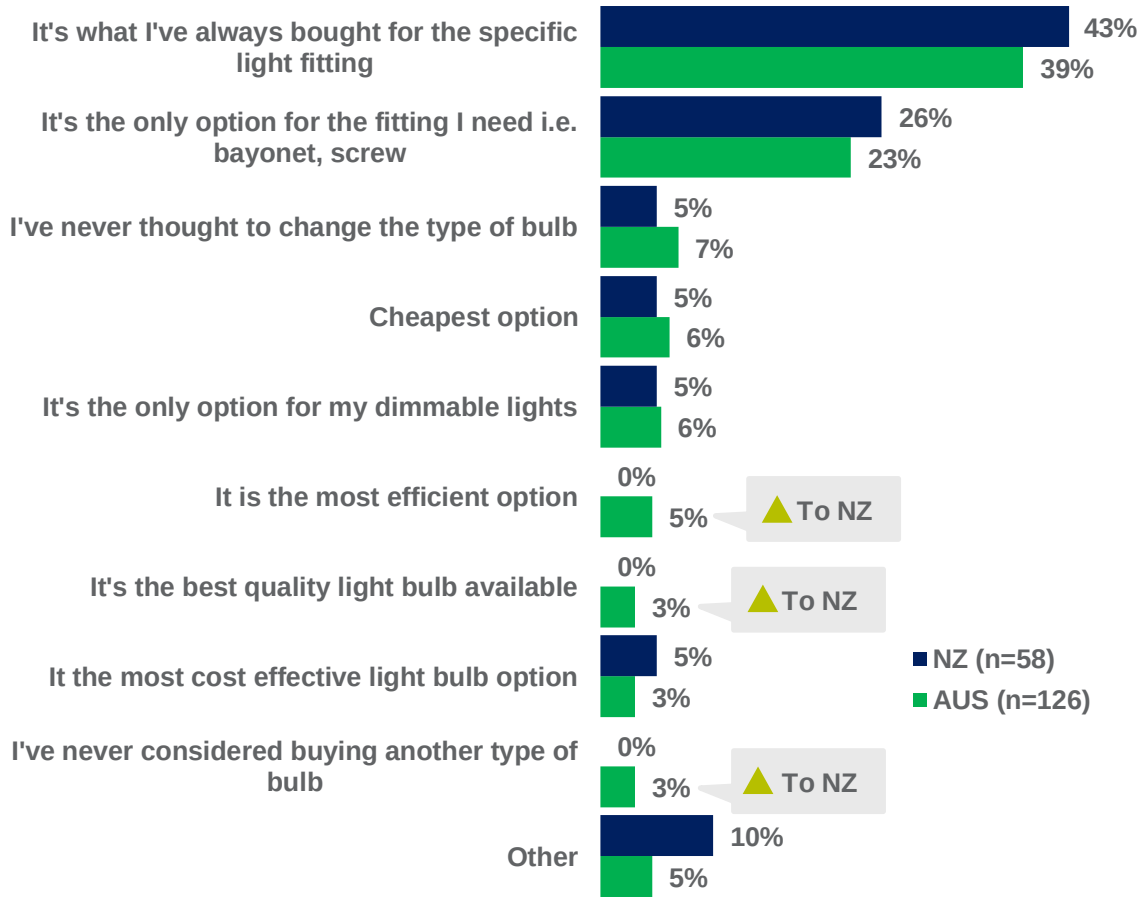
Q14. Why do you buy Traditional incandescent GLS?

Incandescent: candle/fancy round.

The reasons for purchasing incandescent candle or fancy round bulbs focus on habit and the specific lighting need.

Findings are similar for purchasers in Australia and New Zealand.



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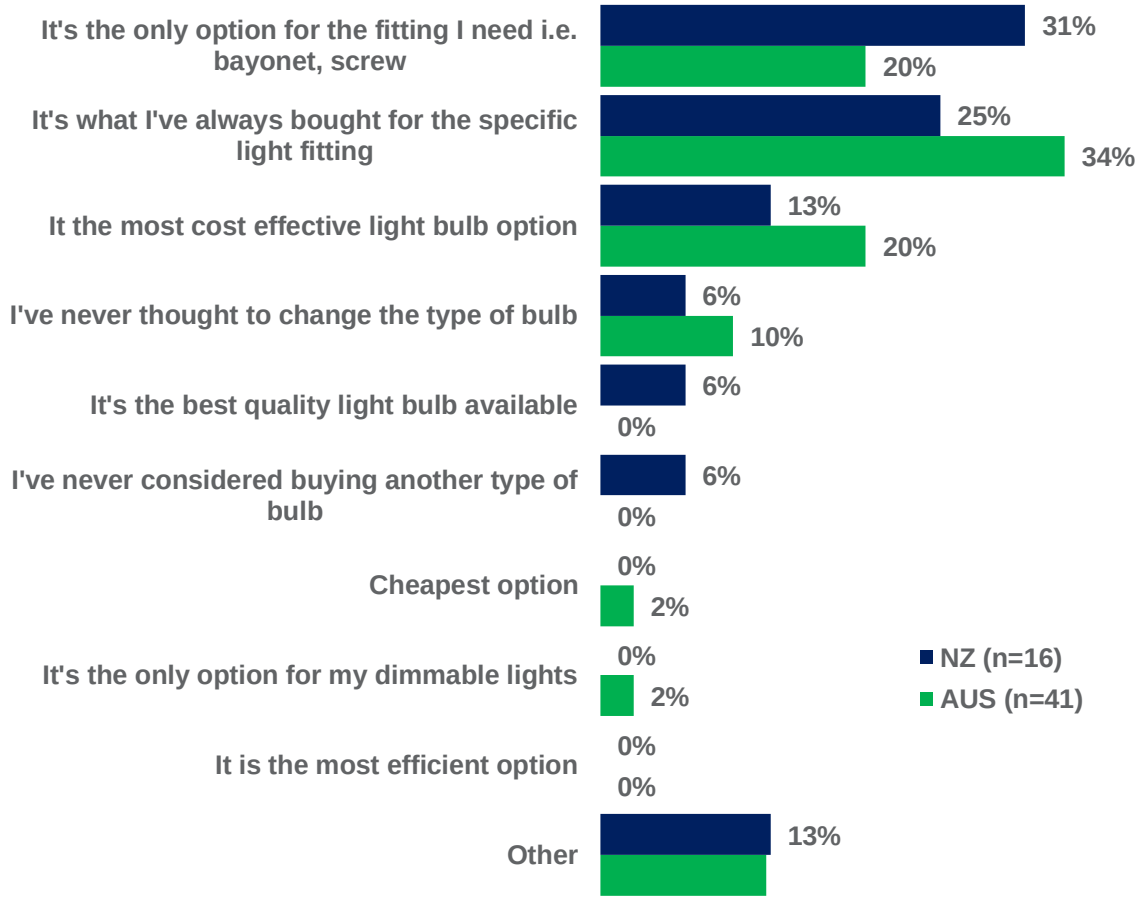
Q14. Why do you buy Incandescent: candle/fancy round?

Incandescent: decorative Lights.

New Zealand purchasers primarily buy decorative incandescent bulbs out of necessity for a specific fitting (31%), while habit is the most common reason among Australians (34%).

Habit is the second most cited motivator for New Zealanders at one-quarter (25%). Similarly, one-fifth of Australians buy these bulbs out of necessity (20%).



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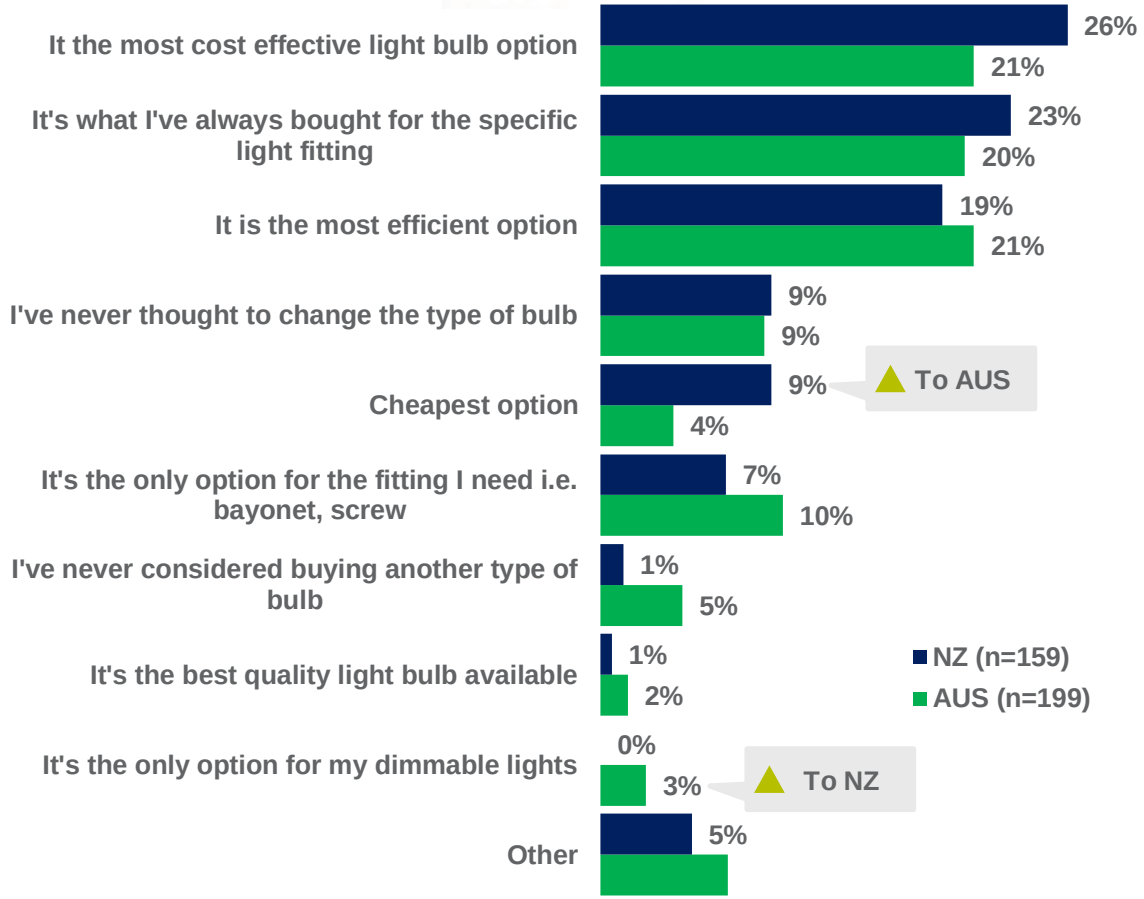
Q14. Why do you buy Incandescent: Incandescent: decorative Lights?

CFL (Compact Florescent Lights).

Cost-effectiveness is a primary motivator in both countries, with one-fifth of Australians and one-quarter of New Zealanders citing this as a reason for purchasing CFL bulbs (21% and 26% respectively).

One-fifth of Australians and slightly under one-quarter of New Zealanders indicated that they bought these out of habit. Efficiency was also a reason for approximately one-fifth of both groups.



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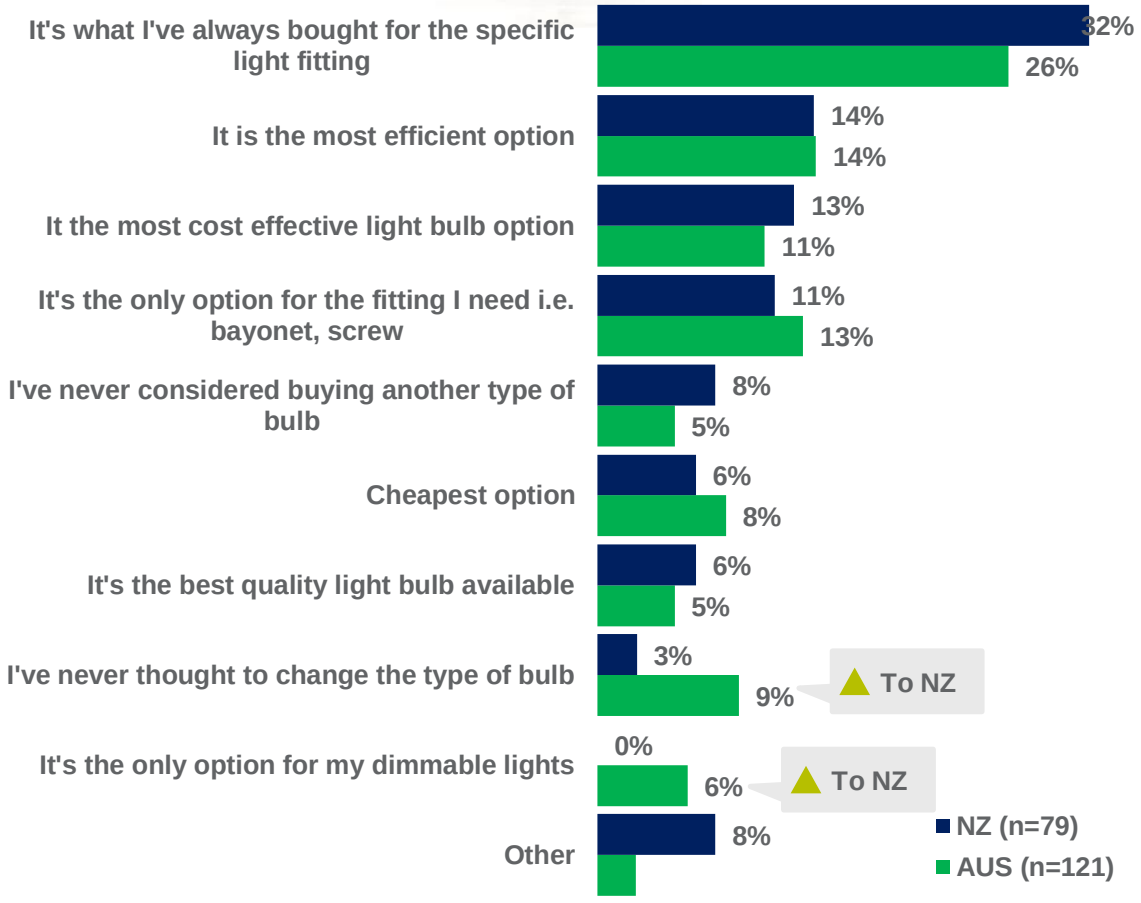
Q14. Why do you buy Incandescent: CFL (Compact Florescent Lights)?

Halogen light bulbs.

The most common reason for buying halogen bulbs among one-quarter of Australian and one-third of New Zealand purchasers was habit (26% and 32% respectively).

Efficiency was the next most common reason as selected by one-seventh of both groups (14% each).

It is important to note that, when considering Halogen bulbs, purchasers are half as likely to choose the most efficient option, as they are to follow habit.



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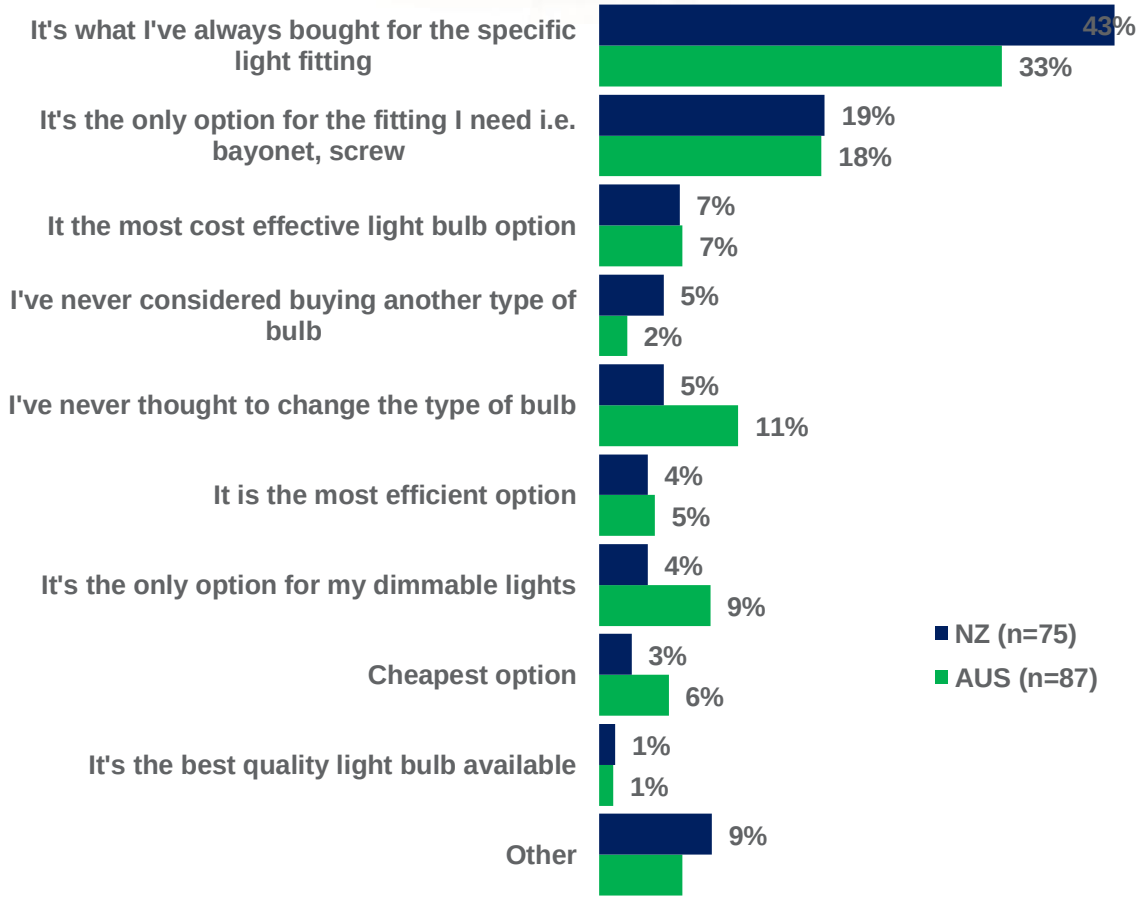
Q14. Why do you buy Halogen light bulbs?

Halogen Downlights.

Once again, most purchasers of halogen downlights reported doing so out of habit, as reported by two-fifths of New Zealanders (43%) and one-third of Australians (33%).

Slightly under one-fifth of both Australian and New Zealand respondents did not know of another option except halogen downlights for their light fixture (19% and 18% respectively).



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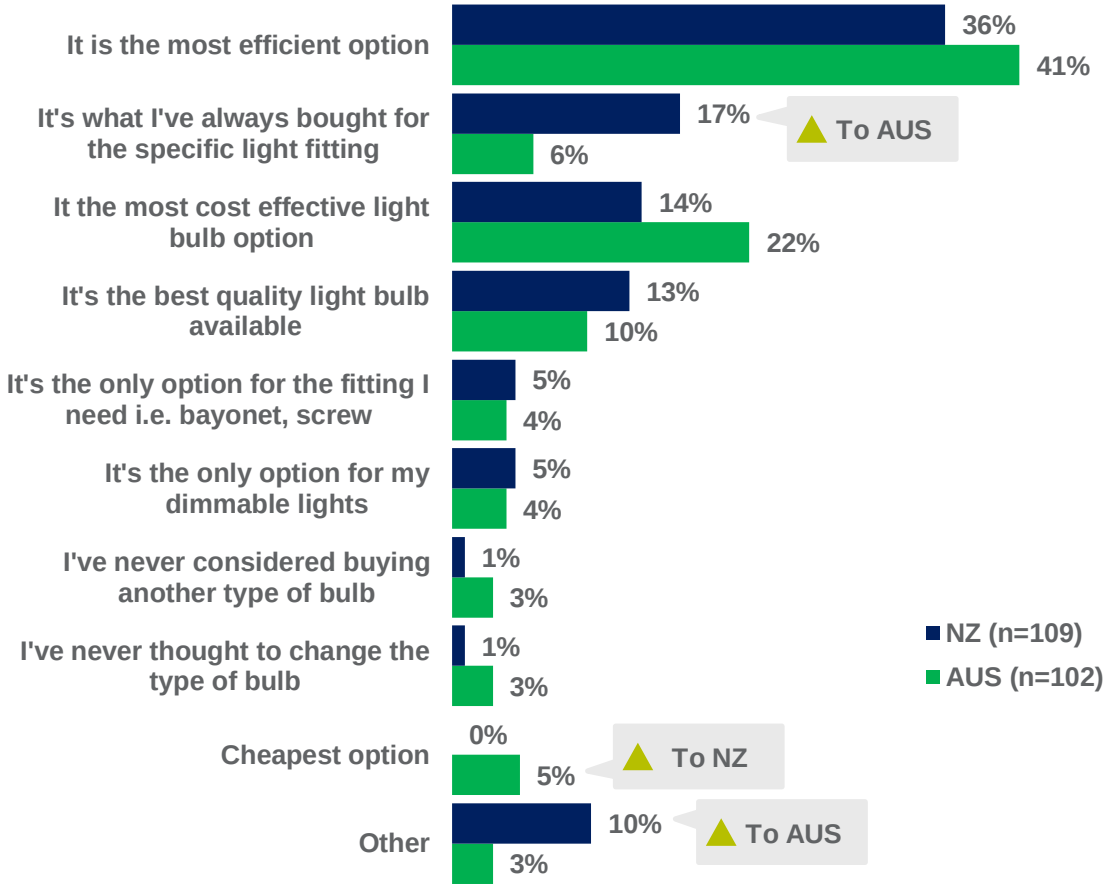
Q14. Why do you buy Halogen downlights?

LED light bulbs.

Over one-third of New Zealanders and two-fifths of Australians purchased LED bulbs because they were the most efficient option (36% and 41% respectively).

The next most common reason for Australians was cost-effectiveness at one-fifth (22%). Fewer New Zealanders cited this (14%).

Habit was a motivator for substantially more New Zealanders at one-sixth, compared to one-twelfth of Australians (17% compared to 6%).



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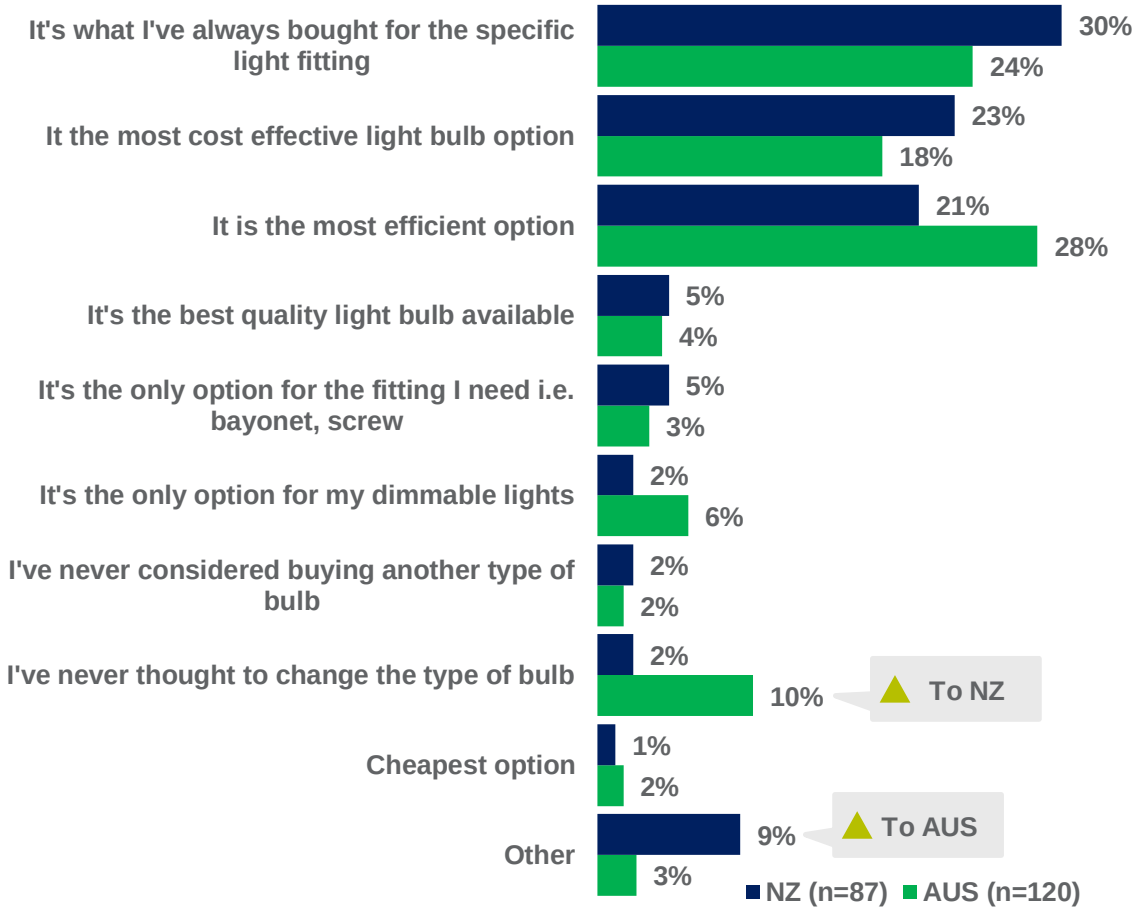
Q14. Why do you buy LED light bulbs?

LED downlights.

When purchasing LED downlights, Australians cited efficiency reasons more often than New Zealanders, and vice-versa for habit and cost-effectiveness.

For three-tenths of New Zealanders and one-quarter of Australians, habit was a primary motivator (30% and 24% respectively). Economical reasons were also more prevalent among New Zealanders at one-quarter, compared to Australians at one-fifth (23% compared to 18%).

Efficiency was a priority for over a quarter of Australian purchasers, while the same was true of one-fifth of New Zealanders (28% and 21% respectively).



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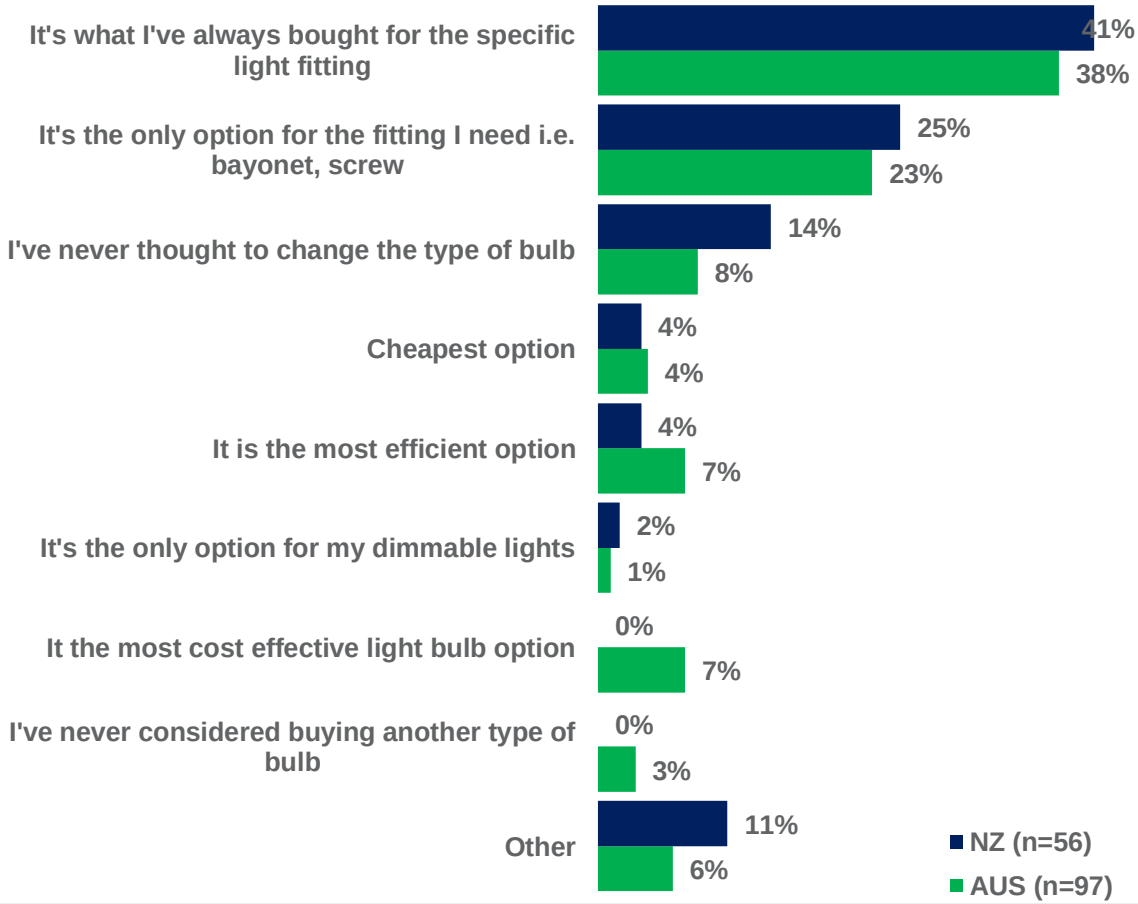
Q14. Why do you buy LED downlights?

Linear fluorescent tube lights.

Australians and New Zealanders cited similar reasons for buying linear fluorescent tube lights, with habit and necessity being the most common of these.

Approximately one-fifth each of Australian and New Zealand purchasers indicated that they did so out of habit (41% and 38% respectively).

Slightly fewer, at around one-quarter each, believed it was the only option for their fitting (25% for Australians and 23% for New Zealanders)



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▼ Significantly LOWER compared to total at 95% confidence.

Q14. Why do you buy Linear fluorescent tube Lights?

Light Bulb Usage.

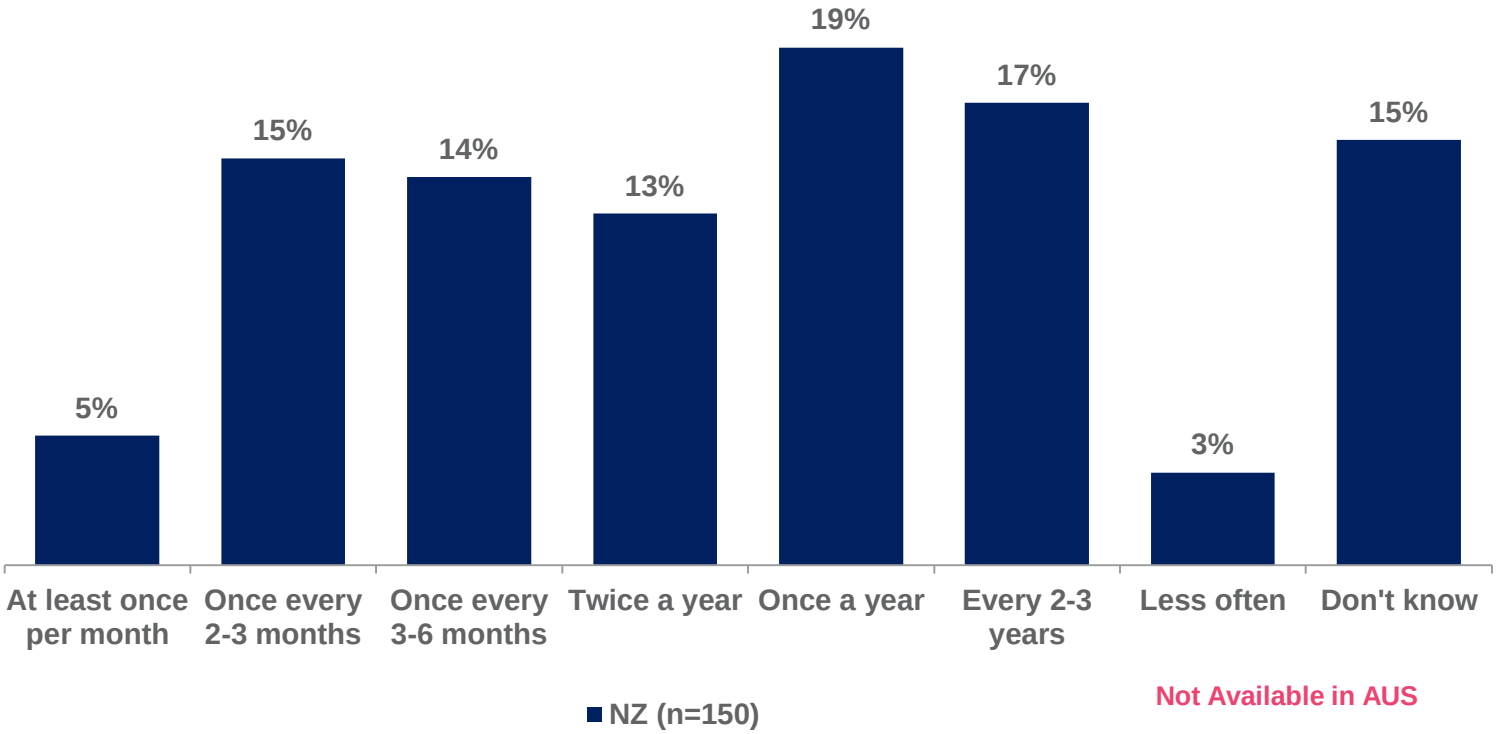
Frequency of Replacement.

Traditional incandescent GLS.

Overall, a fifth of New Zealanders replace their traditional incandescent GLS bulbs every 3 months or more often.

Half replace their incandescent globes at least twice a year (47%).

One-fifth replaced them once per year (19%), while one-sixth did so every 2–3 years (17%).



Not Available in AUS

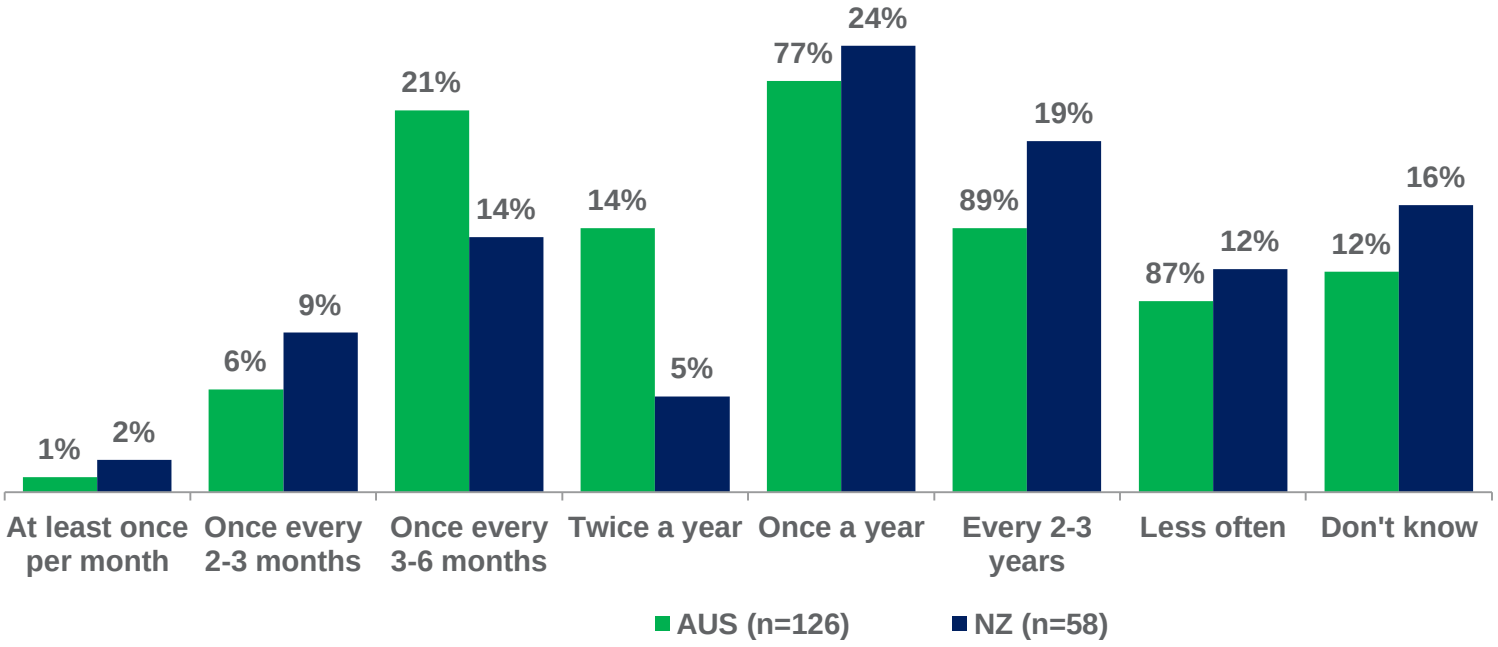
Q15. Generally speaking, how often do you need to replace Traditional incandescent GLS?

Base: All respondents

Incandescent: candle/fancy round.

Two-fifths of Australians change their candle/fancy round bulbs twice per year or more often (41%). Slightly less than half report doing so once per year or less (47%).

New Zealanders' responses reflected slightly less frequent changes, with under one-third changing their bulbs twice a year or more and more than half doing so once a year or less (29% and 55% respectively).



Q15. Generally speaking, how often do you need to replace Incandescent: candle/fancy round?

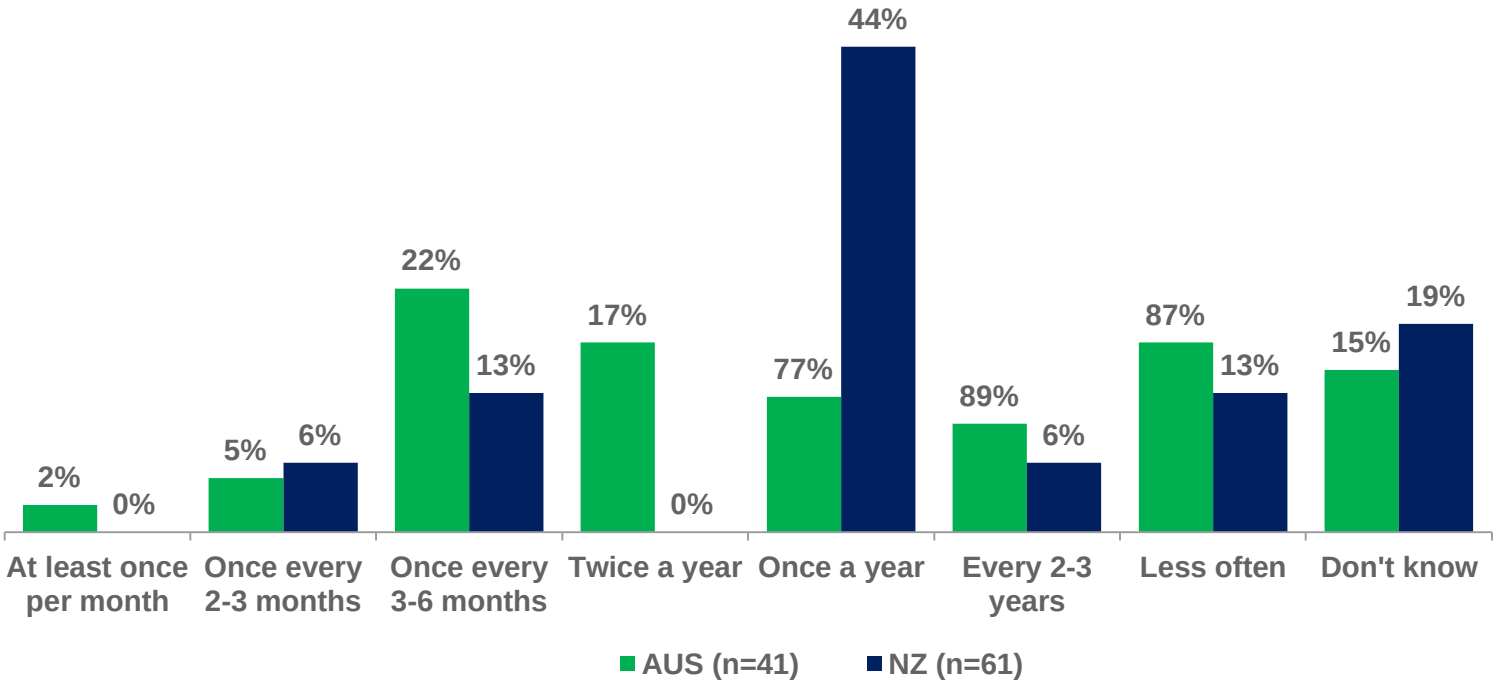
Base: All respondents

Incandescent: decorative.

Australians generally changed their decorative incandescent bulbs more frequently than New Zealanders.

One-fifth of New Zealanders changed their bulbs twice per year or more often (19%) compared to nearly one-half of Australians (46%).

Conversely, changing bulbs once a year or less was reported by two-fifths of New Zealanders (63%), while two-fifths of Australians said the same (39%).



Q15. Generally speaking, how often do you need to replace Incandescent: decorative?

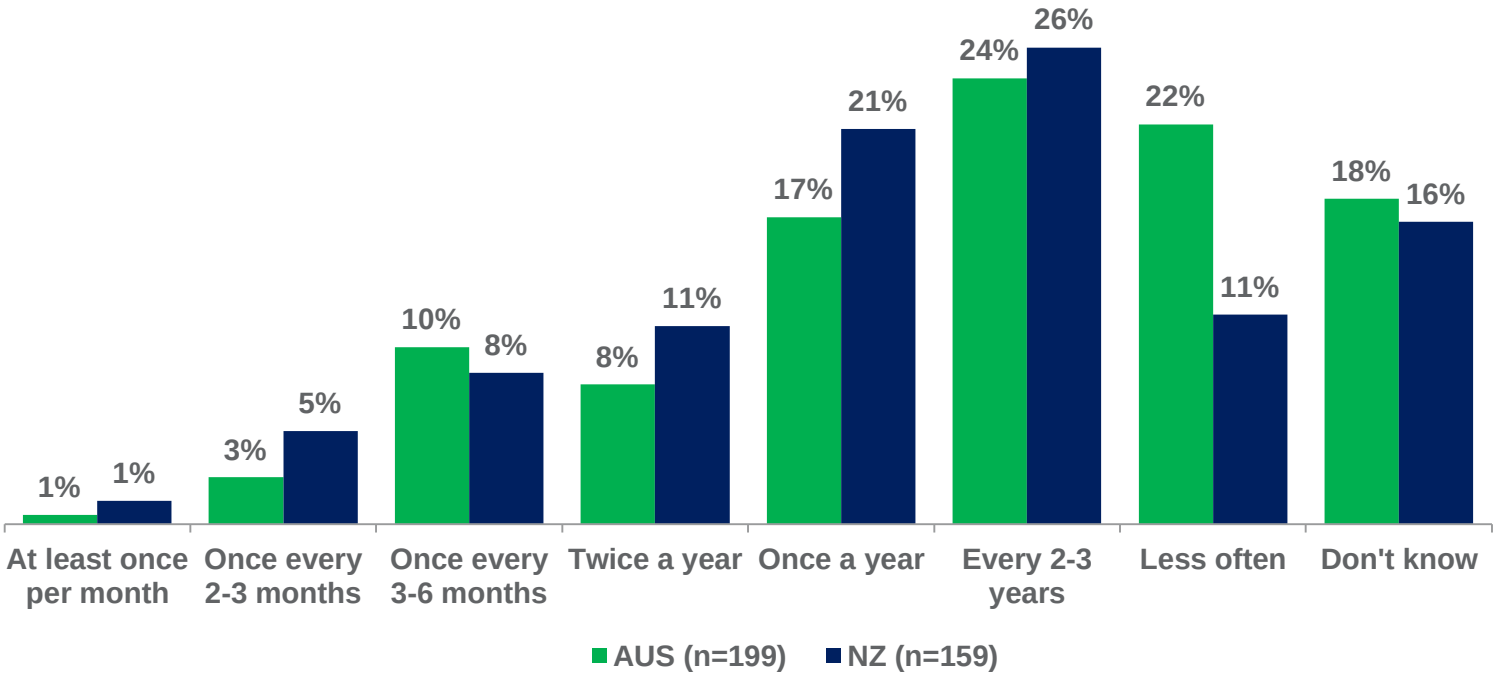
Base: All respondents

CFL (Compact Florescent Lights).

Rates of CFL bulb change were similar for Australian and New Zealand respondents.

Around a quarter of both groups reported changing their bulbs every 2–3 years, making this the most common rate (24% and 26% respectively).

Australians were twice as likely as New Zealanders to leave 3 or more years between changing their CFL bulbs (22% vs. 11%).



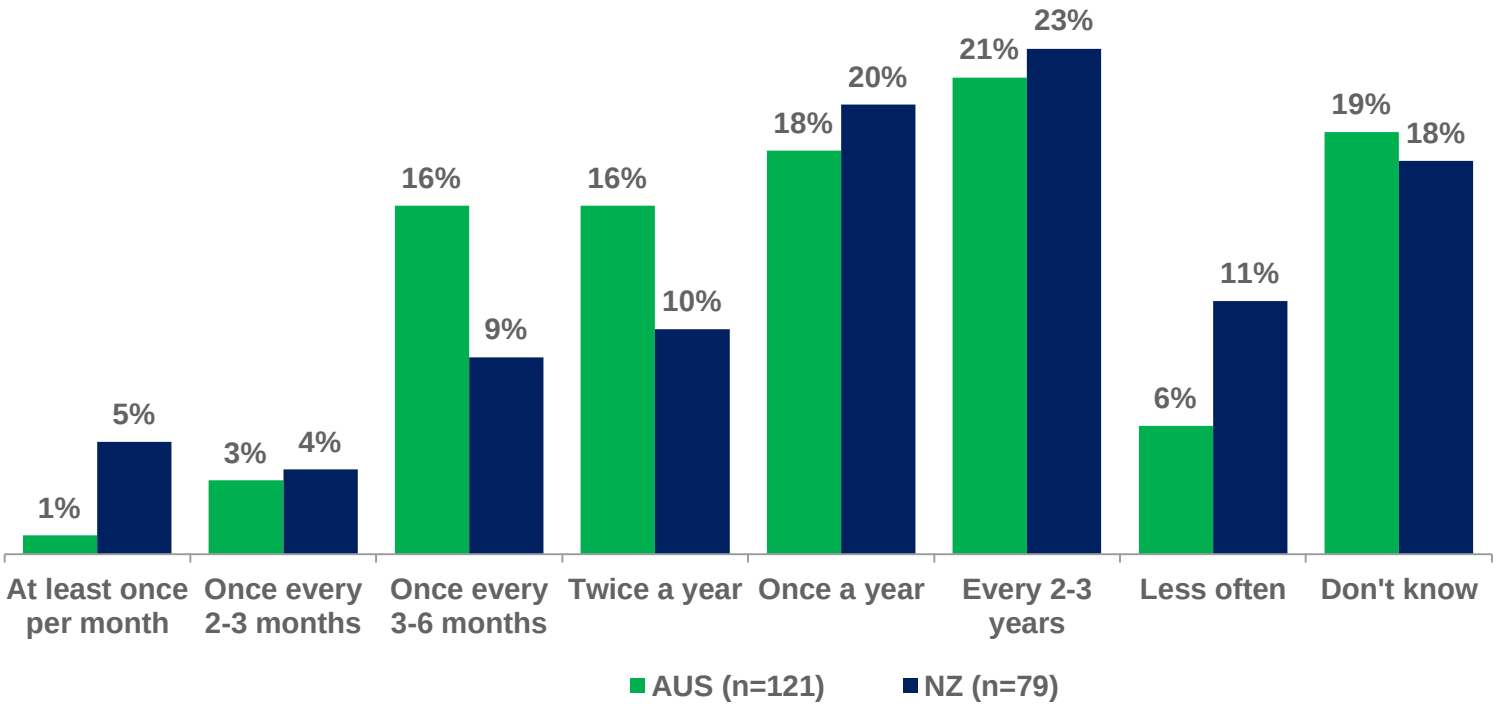
Q15. Generally speaking, how often do you need to replace CFL (Compact Florescent Lights)?

Base: All respondents

Halogen light bulbs.

Australians report more frequent halogen bulb changes than New Zealanders, though five times as many New Zealanders changed them at least once per month (5% compared to 1%).

Over one-third of Australians changed their halogen bulbs twice per year or more (36%), while under three in ten New Zealanders said the same (28%). Conversely, slightly more New Zealanders changed their bulbs once per year or less compared to Australians (54% compared to 45%).



Q15. Generally speaking, how often do you need to replace Halogen light bulbs?

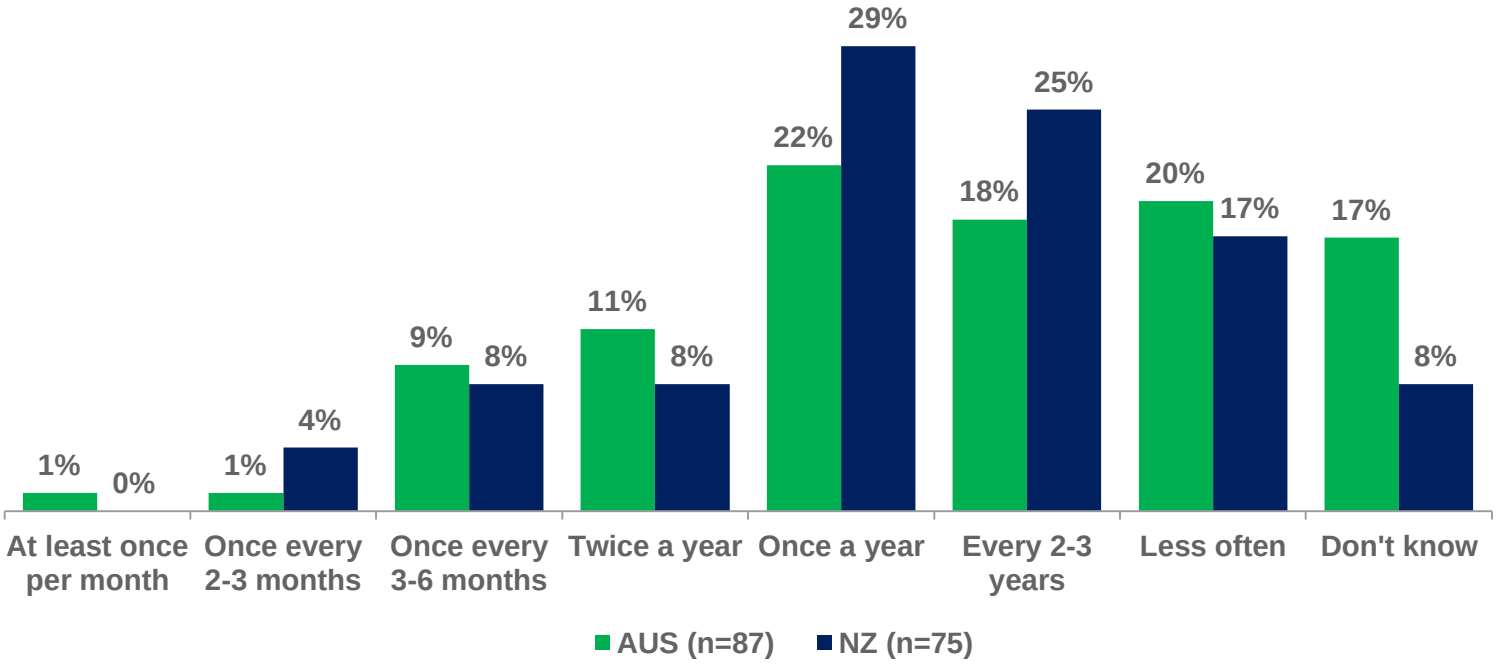
Base: All respondents

Halogen downlights.

Halogen downlights were changed less often than halogen light bulbs across both groups.

Around one-fifth of both Australians and New Zealanders changed their downlights twice per year or more often (23% and 20% respectively).

New Zealanders were slightly more likely to change their bulbs once per year or less often, at almost three-quarters (72%). Two-fifths of Australians reported the same (60%).



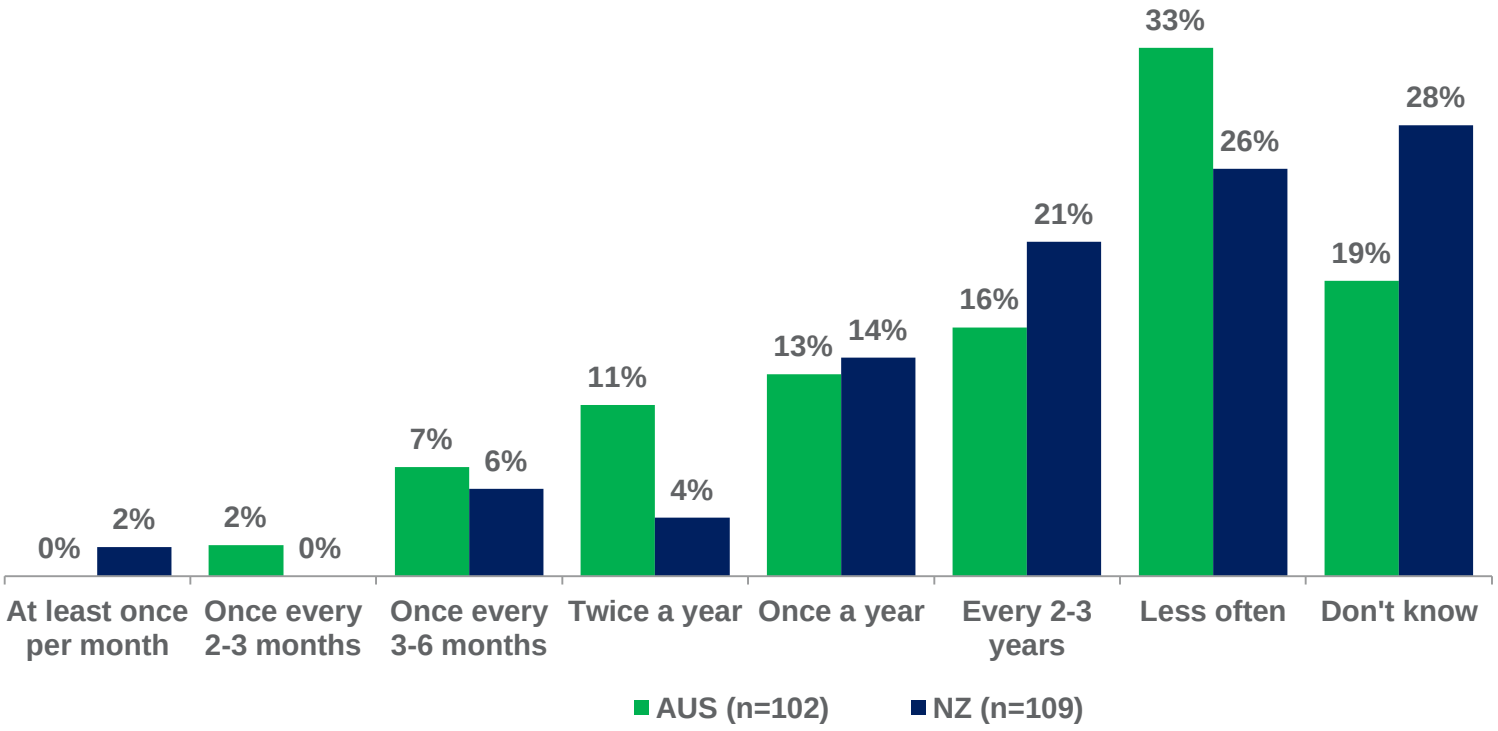
Q15. Generally speaking, how often do you need to replace Halogen downlights?

Base: All respondents

LED light bulbs.

One in nine New Zealanders and one in five Australians reported changing their LED bulbs twice per year or more (11% and 20% respectively).

Almost the same proportion of both groups, however, reported doing so once a year or less frequently (62%).



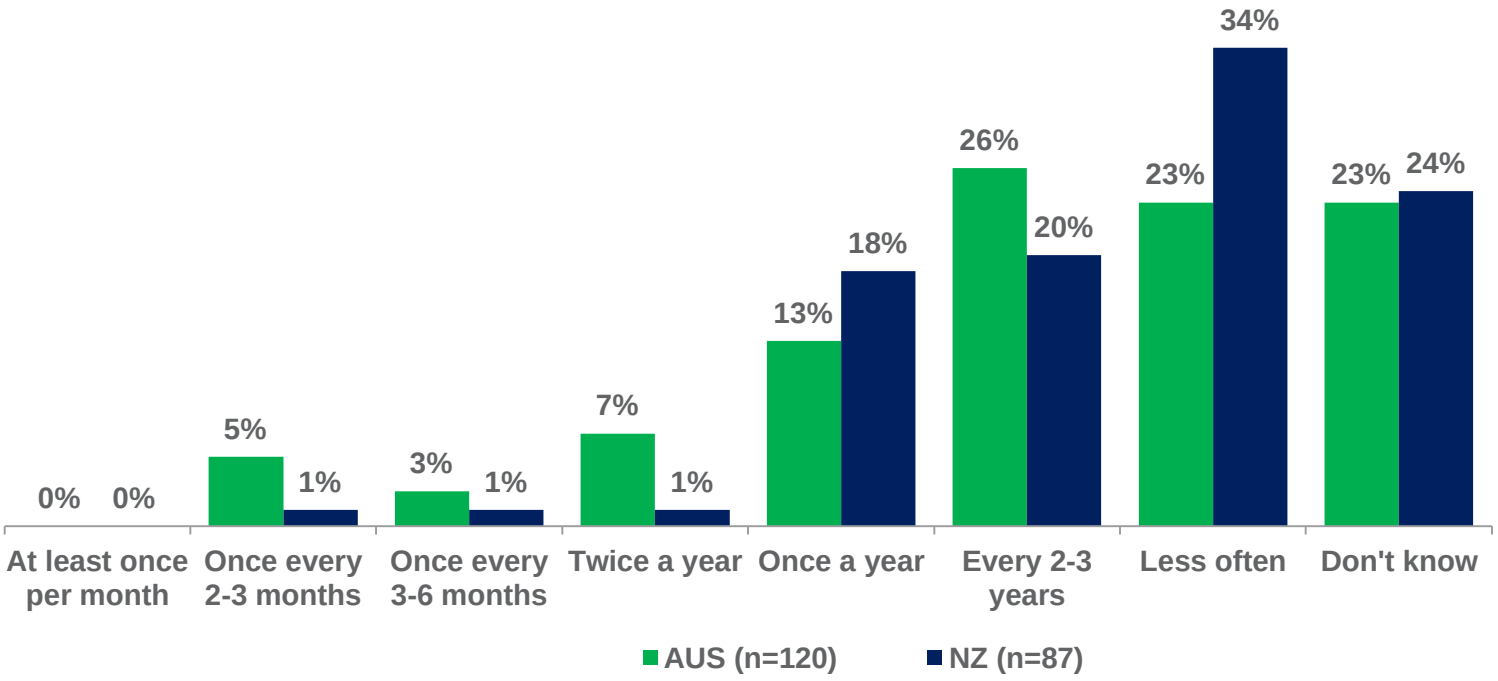
Q15. Generally speaking, how often do you need to replace LED light bulbs?

Base: All respondents

LED Downlights.

While Australians are more likely to report more frequent bulb changes, few changed their LED downlights twice per year or more (14% of Australians and 3% of New Zealanders).

Australians most commonly change their bulbs every 2–3 years, while New Zealanders most frequently report doing so less often than this (26% and 34% respectively).



Q15. Generally speaking, how often do you need to replace LED downlights?

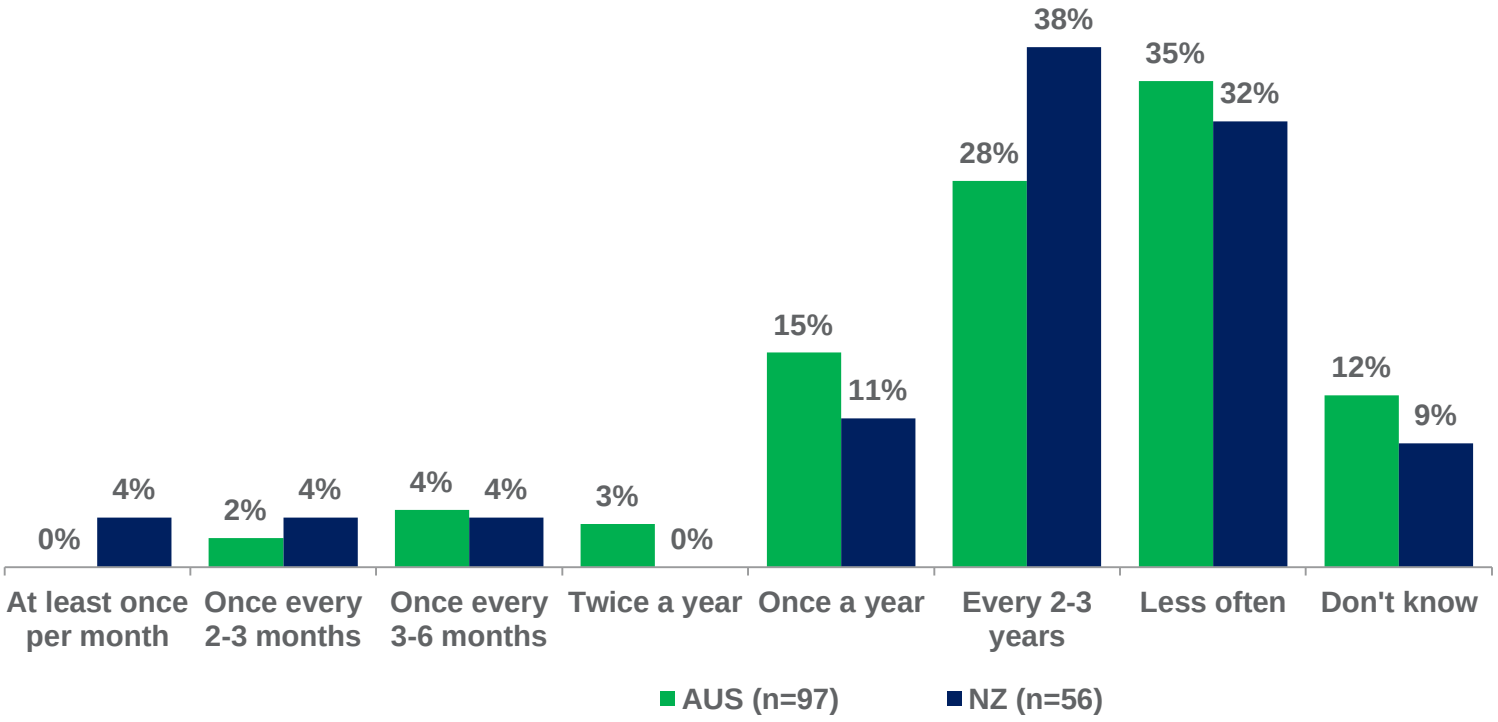
Base: All respondents

Linear fluorescent tube.

Across both countries, linear fluorescent tubes were changed relatively rarely.

Three-fifths of Australian and seven-tenths of New Zealand participants changed their linear fluorescent tube bulbs every 2–3 years or less (63% and 70% respectively).

One-quarter of Australians and one-fifth of New Zealanders changed them once per year or more (25% and 21% respectively).



Q15. Generally speaking, how often do you need to replace Linear fluorescent tube?

Base: All respondents

Value for Money.

Traditional incandescent GLS

Nine in ten New Zealanders believe that they receive at least good value for money from their traditional incandescent GLS globes.

Not Available in AUS

Q16. How would you rate the value for money that you get from Traditional incandescent GLS?

Base: All respondents

Incandescent: candle/fancy round.

Incandescent candle/fancy round globes are also assessed to be good value for money by the majority, by six-sevenths each of Australians and New Zealanders (86% each).

Q16. How would you rate the value for money that you get from Incandescent: candle/fancy round?

Base: All respondents

Incandescent: decorative.

Decorative incandescent globes are perceived to have the least value for money of all globes: one-quarter of New Zealanders and one-fifth of Australians assessed this negatively.

New Zealanders, however, are more likely than Australians to report very good or excellent value (44% vs. 31%).

Q16. How would you rate the value for money that you get from Incandescent: decorative?

Base: All respondents

CFL (Compact Florescent Lights).

Compact fluorescent lights were seen to be good value for money by over nine-tenths of both Australian and New Zealand respondents (91% and 92% respectively).

One in seven respondents within both groups reported excellent value for money from these globes (14% and 13% respectively).

Q16. How would you rate the value for money that you get from CFL (Compact Florescent Lights)?

Base: All respondents

Halogen light bulbs.

Over nine-tenths of New Zealanders and Australians both feel positively about the value for money they receive from their halogen light bulbs (94% and 92% respectively).

Q16. How would you rate the value for money that you get from Halogen light bulbs?

Base: All respondents

Halogen Downlights.

Halogen down lights are slightly less well-received, particularly by New Zealanders. While four-fifths of this group perceive good value for money, one-fifth do not (81% and 19% respectively).

Perceptions were marginally more positive among Australians, five-sixths of whom feel positively in this area (85%). One-sixth believe the value for money they receive is poor (15%).

Q16. How would you rate the value for money that you get from Halogen downlights?

Base: All respondents

LED light bulbs.

Approximately one-quarter of both Australian and New Zealand respondents perceive LED bulbs to provide excellent value for money (24% and 28% respectively).

A sense of poor value is expressed by one in twenty respondents within both countries, among the lowest rates of all bulbs (5% and 6% respectively).

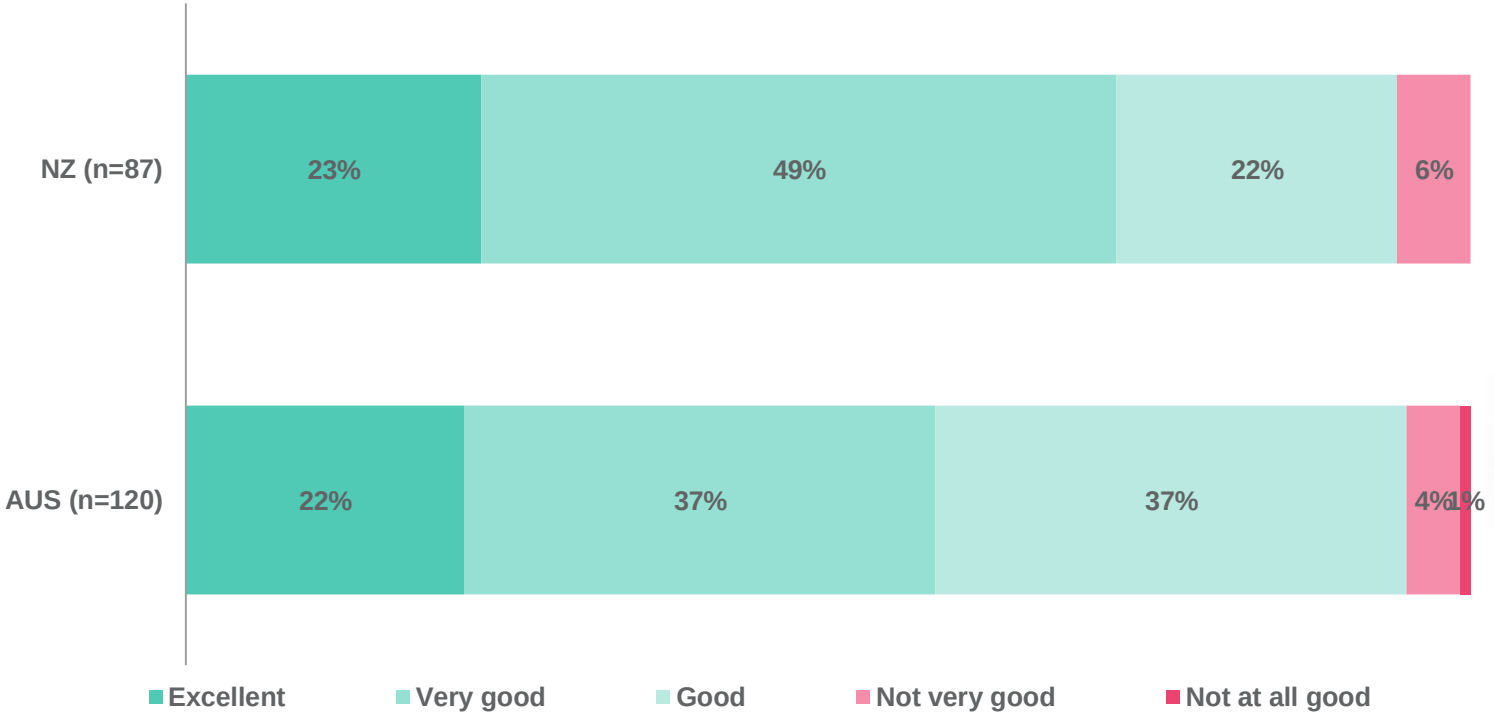
Q16. How would you rate the value for money that you get from LED light bulbs?

Base: All respondents

LED Downlights.

LED down lights are perceived to provide good value by most; over nineteen in twenty Australians and New Zealanders reported this to be the case (95% and 94% respectively).

These were seen to have the best value for money by New Zealanders overall, equal with LED light bulbs.



Q16. How would you rate the value for money that you get from LED Downlights?

Base: All respondents

Linear fluorescent tube.

Australians assessed fluorescent tube bulbs to have the greatest value for money of all bulbs, with over nineteen in twenty believing this to be good to excellent (96%).

New Zealand participants were somewhat less positive, with nine in ten receiving at least good value (91%).

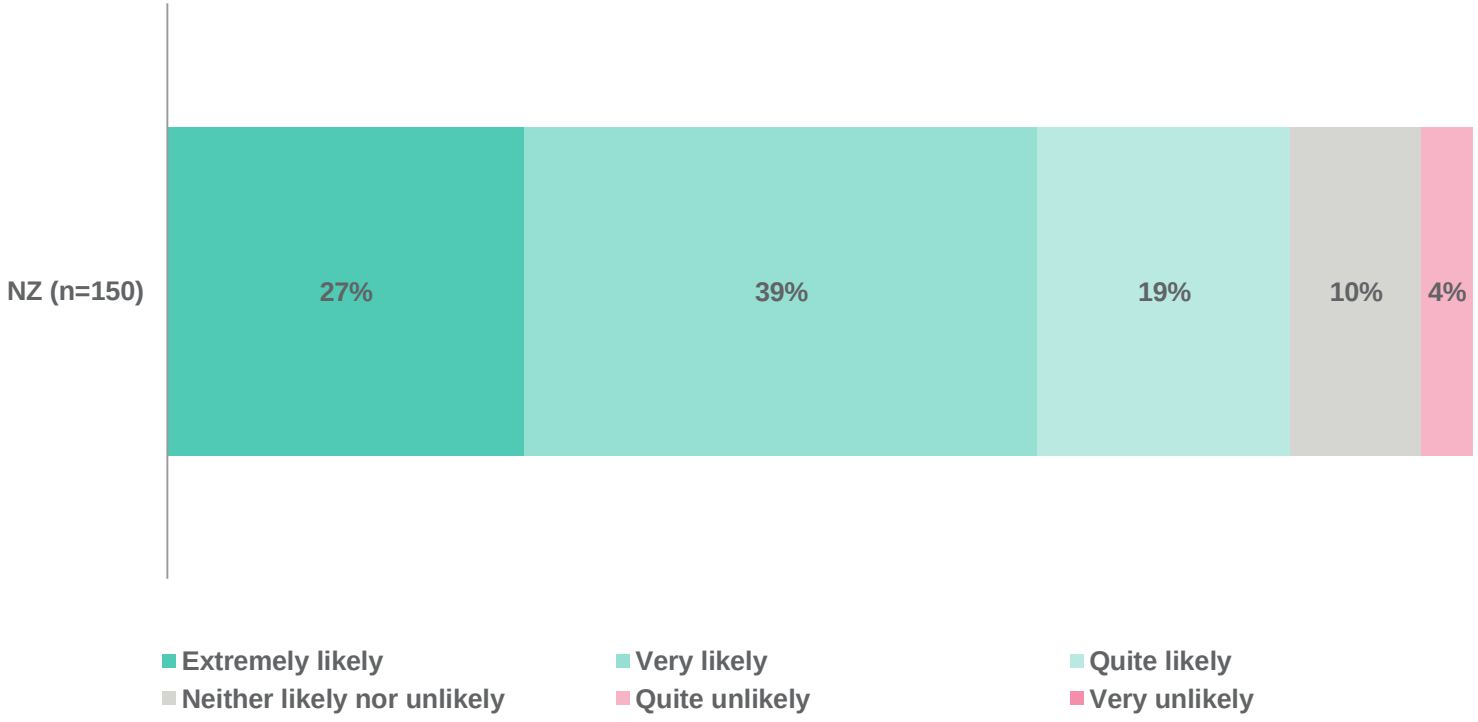
Q16. How would you rate the value for money that you get from Linear fluorescent tube?

Base: All respondents

Likeliness to purchase.

Traditional incandescent GLS.

Five-sixths of New Zealanders s indicate that, were traditional incandescent GLS bulbs $1 per piece on average, they would be at least quite likely to purchase them (86%). One in ten felt neutrally on the matter (10%), while less than one in twenty were unlikely to purchase at this price (4%).



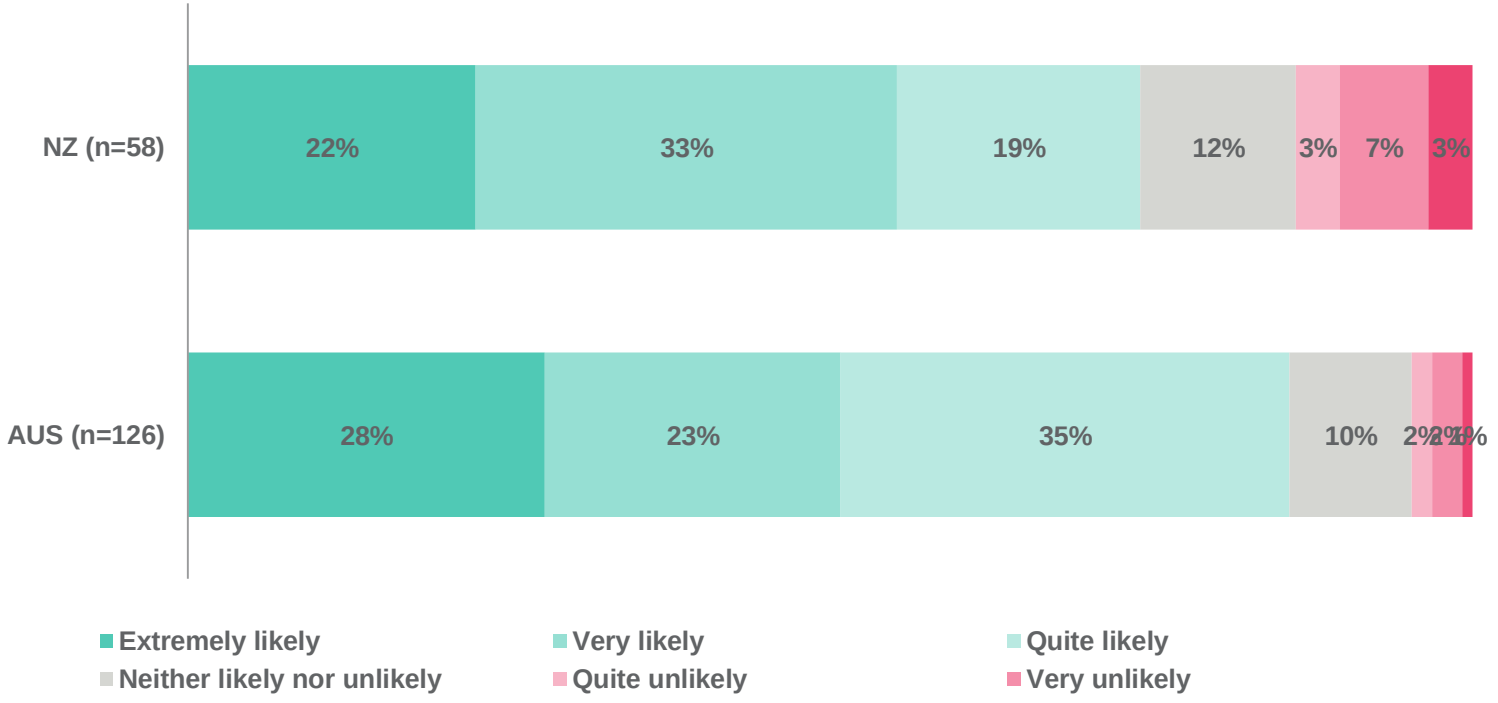
Not Available in AUS

Q17 If the average price for Traditional incandescent GLS light bulb is $1, how likely or unlikely would you be to purchase this bulb?

Base: All respondents

Incandescent: candle/fancy round.

Australians were generally less resistant than New Zealanders to the thought of buying incandescent candle/fancy round bulbs at $2 each, with one in twenty of the former and one in seven of the latter indicating they would be unlikely to consider this.

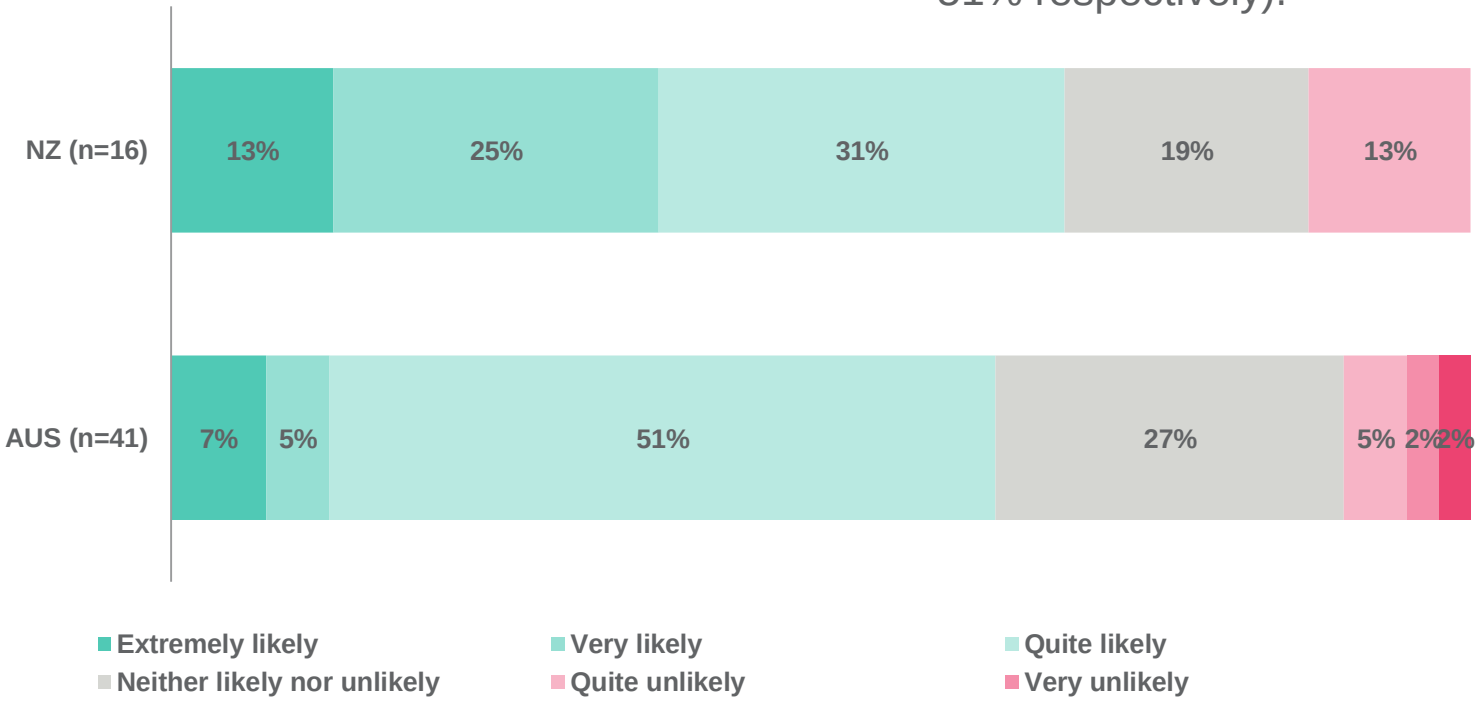


Q17 If the average price for Incandescent: candle/fancy round light bulb is $2, how likely or unlikely would you be to purchase this bulb?

Base: All respondents

Incandescent: decorative.

The price point of $7 for decorative incandescent bulbs is more appealing to New Zealanders than Australians. Two-fifths of New Zealanders felt that they would be at least very likely to purchase at this price (38%), while one in eight Australians shared this level of agreement. The majority of the latter group felt that they would quite likely buy at this price (12% and 51% respectively).



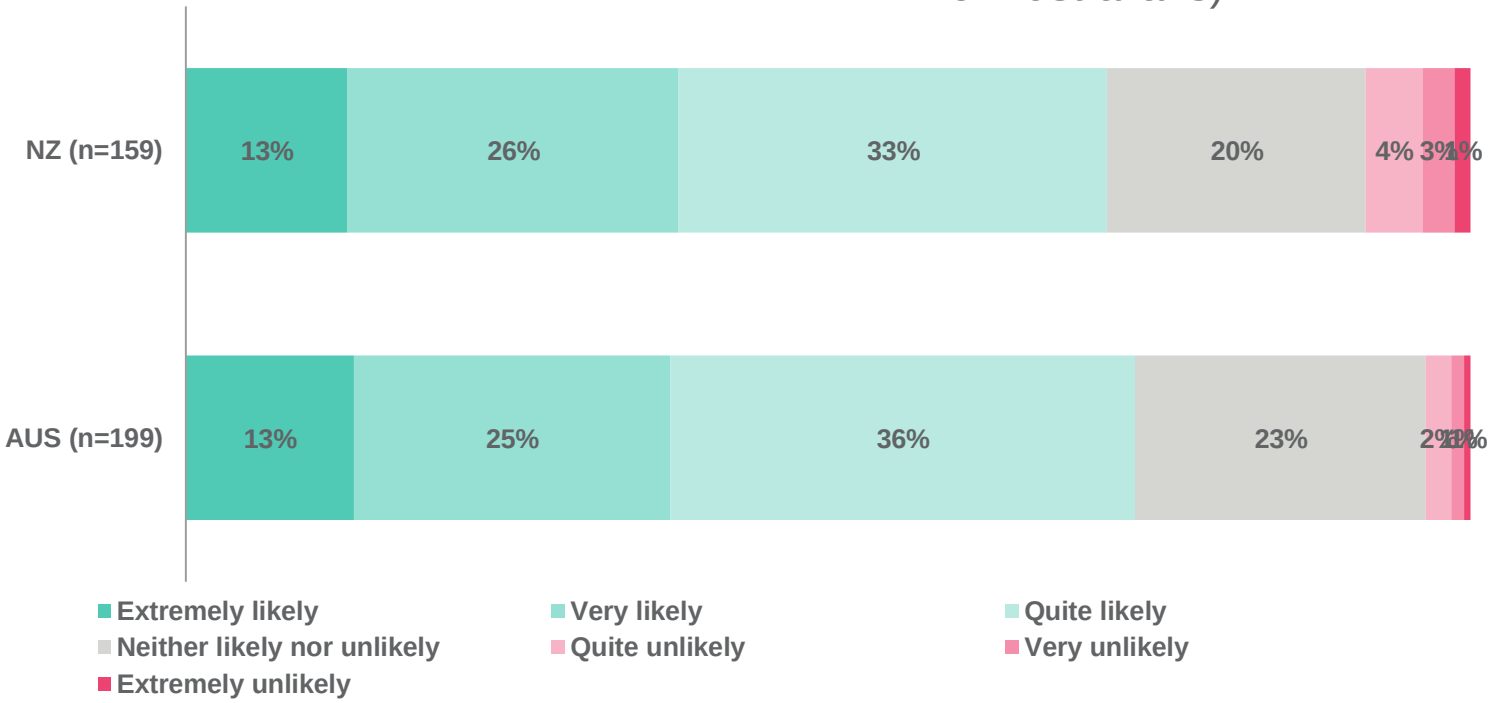
Q17 If the average price for Incandescent: decorative light bulb is $7, how likely or unlikely would you be to purchase this bulb?

Base: All respondents

CFL (Compact Florescent Light).

The majority from both Australia and New Zealand would buy CFL globes at $4 per piece: around three-quarters of each felt they were at least quite likely to do so (74% and 72% respectively)

New Zealanders more commonly felt that they were unlikely to purchase at this price (8% compared to 4% for Australians).



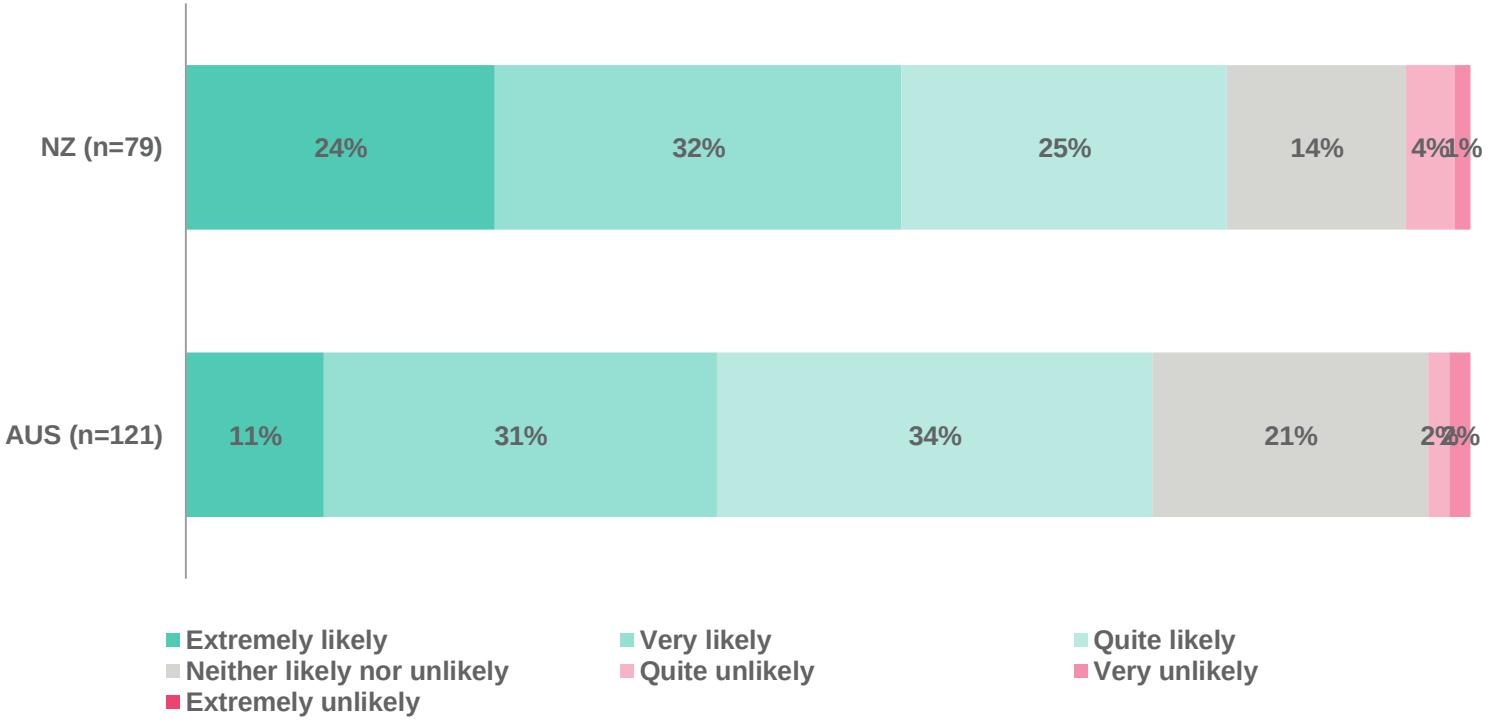
Q17 If the average price for CFL (Compact Florescent Light) bulb is $4, how likely or unlikely would you be to purchase this bulb?

Base: All respondents

Halogen light bulb.

Among both New Zealanders and Australians, most were at least quite likely to buy a $3 halogen bulb (81% and 75% respectively).

New Zealanders more commonly reported that they were extremely likely to do this at one-quarter compared to one-tenth of Australians (24% compared to 11%).



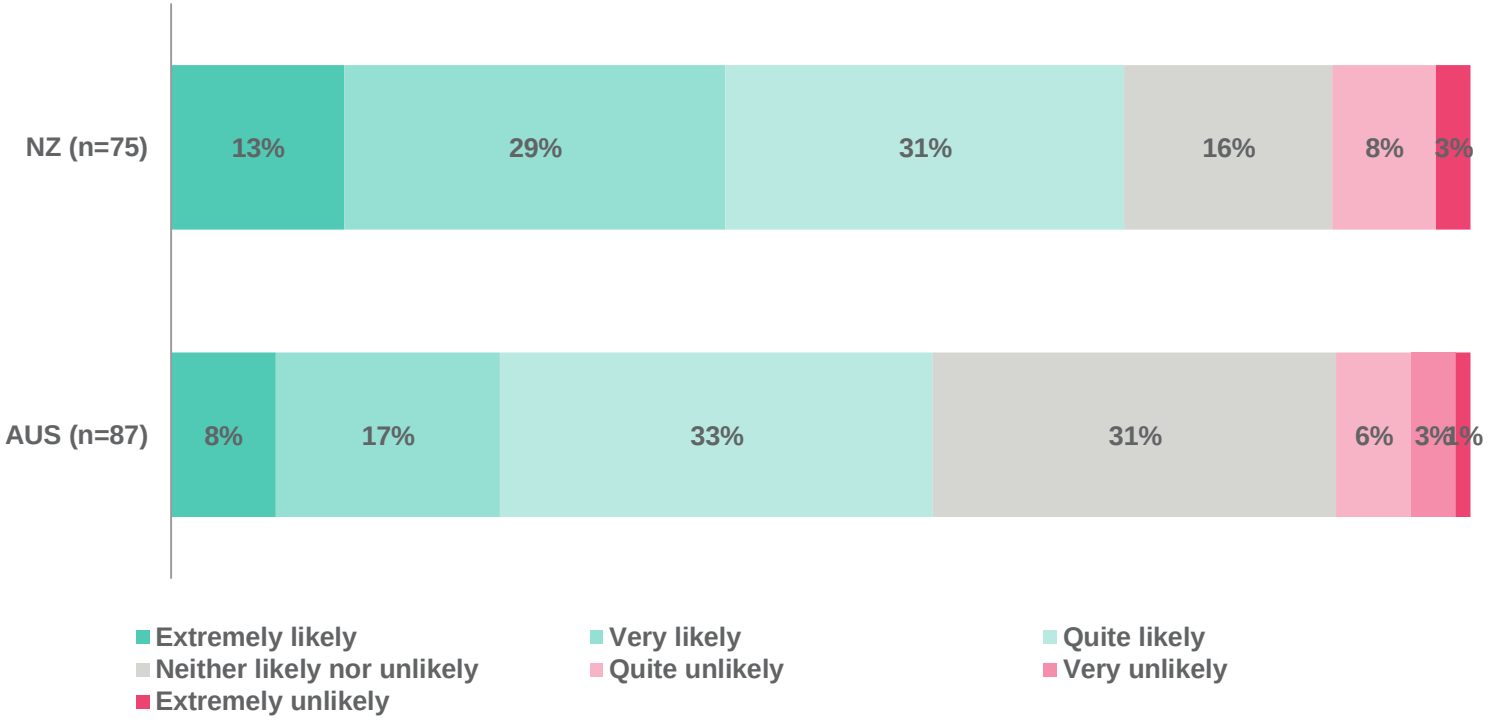
Q17 If the average price for Halogen light bulb is $3, how likely or unlikely would you be to purchase this bulb?

Base: All respondents

Halogen Downlights.

$4 was more agreeable as a halogen downlight price for New Zealanders than Australians. Three-fifths of Australians were at least quite likely to consider purchasing at this price, while the same was true of three-quarters of New Zealanders (59% and 73% respectively).

The proportion who felt themselves unlikely to do so, however, was approximately the same in New Zealanders and Australians (11% and 10% respectively). Almost a third of Australians felt neither likely nor unlikely (31%).



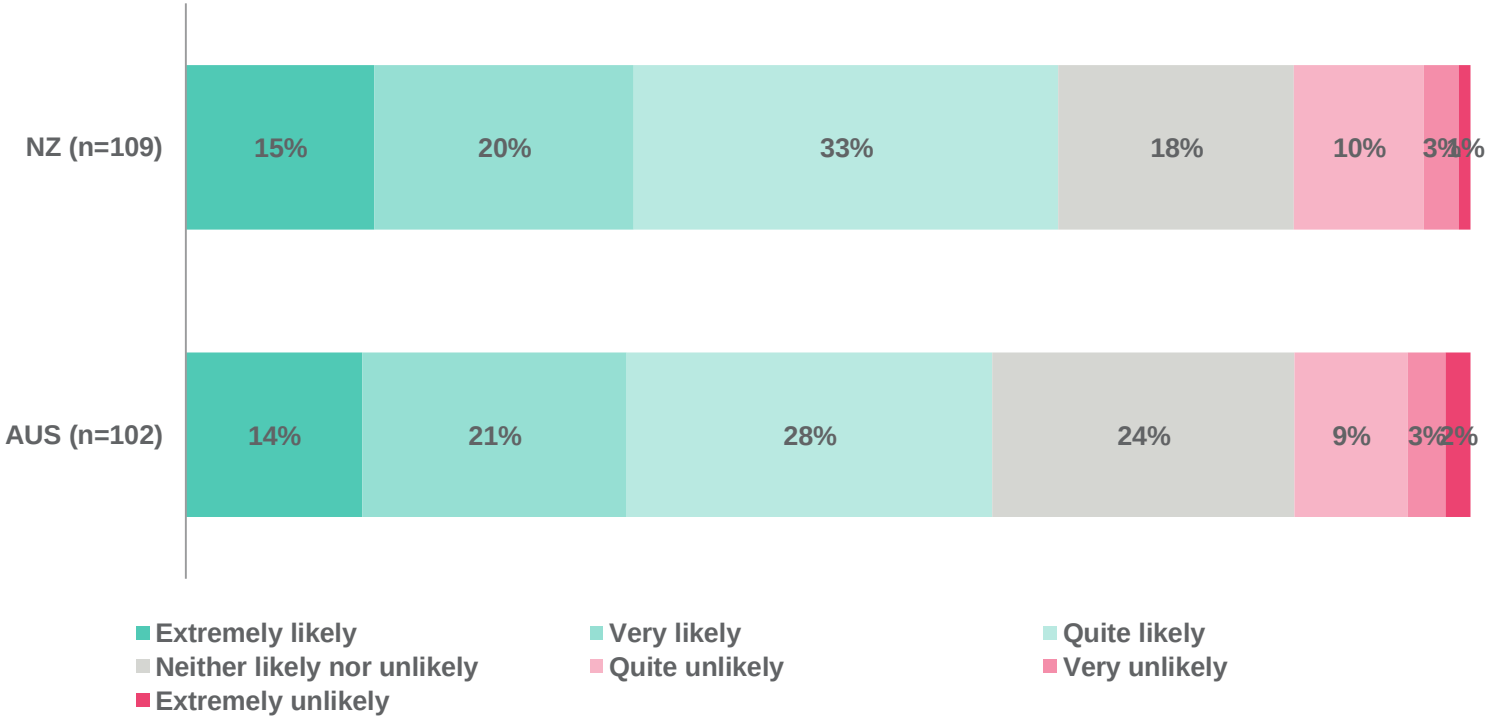
Q17 If the average price for Halogen downlight bulb is $4, how likely or unlikely would you be to purchase this bulb?

Base: All respondents

LED light bulb.

Across both countries, around two-thirds of respondents were at least quite likely to purchase a $10 LED light bulb (68% of New Zealanders, 63% of Australians).

Of all participants, one-seventh from each country felt at least quite unlikely to purchase (14% each).



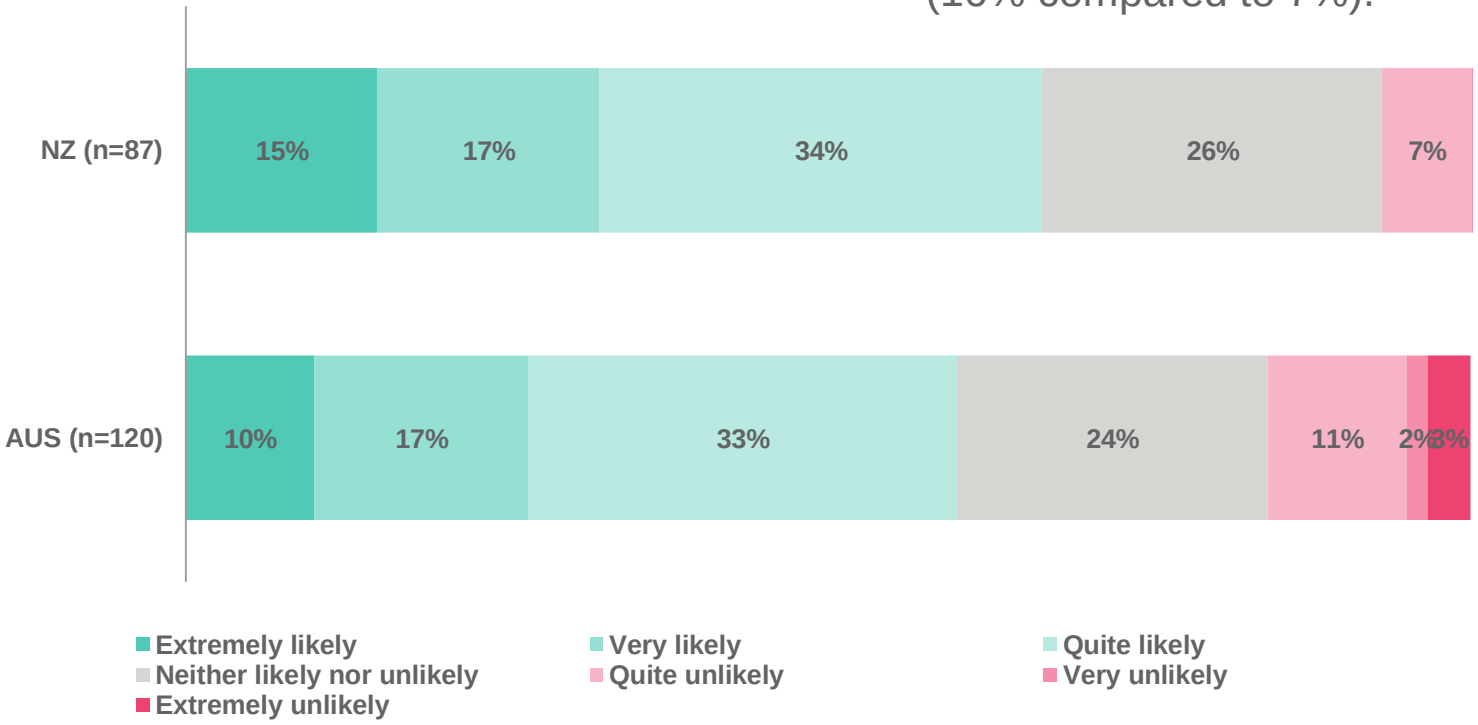
Q17 If the average price for LED light bulb is $10, how likely or unlikely would you be to purchase this bulb?

Base: All respondents

LED Downlights.

While a relatively even three-fifths of Australians and two-thirds of New Zealanders would spend $10 on an LED downlight globe (60% and 67% respectively), some divide can be seen in the proportions who were resistant to this.

One-sixth of Australians were at least quite unlikely to buy LED downlights at this price, more than double the one-fourteenth of New Zealanders who indicated the same (16% compared to 7%).



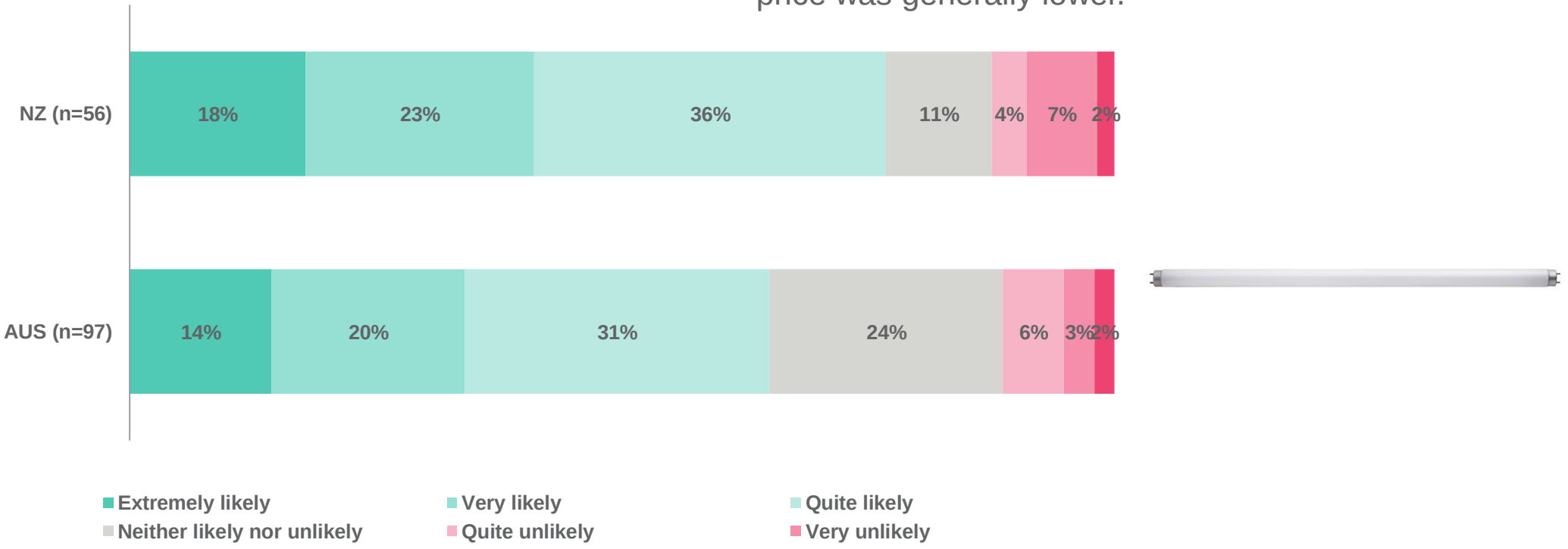
Q17 If the average price for LED downlight is $10, how likely or unlikely would you be to purchase this bulb?

Base: All respondents

Linear fluorescent tube.

Slightly more New Zealanders than Australians felt that they would be at least quite likely buy a linear fluorescent tube bulb at $10 (77% compared to 65%).

Moreover, one-quarter of Australians compared to one-tenth of New Zealanders felt neutral on the matter (24% vs. 11%), and the strength of likelihood among those Australians who would consider buying at this price was generally lower.



Q17 If the average price for Linear fluorescent tube is $10, how likely or unlikely would you be to purchase this bulb?

Base: All respondents

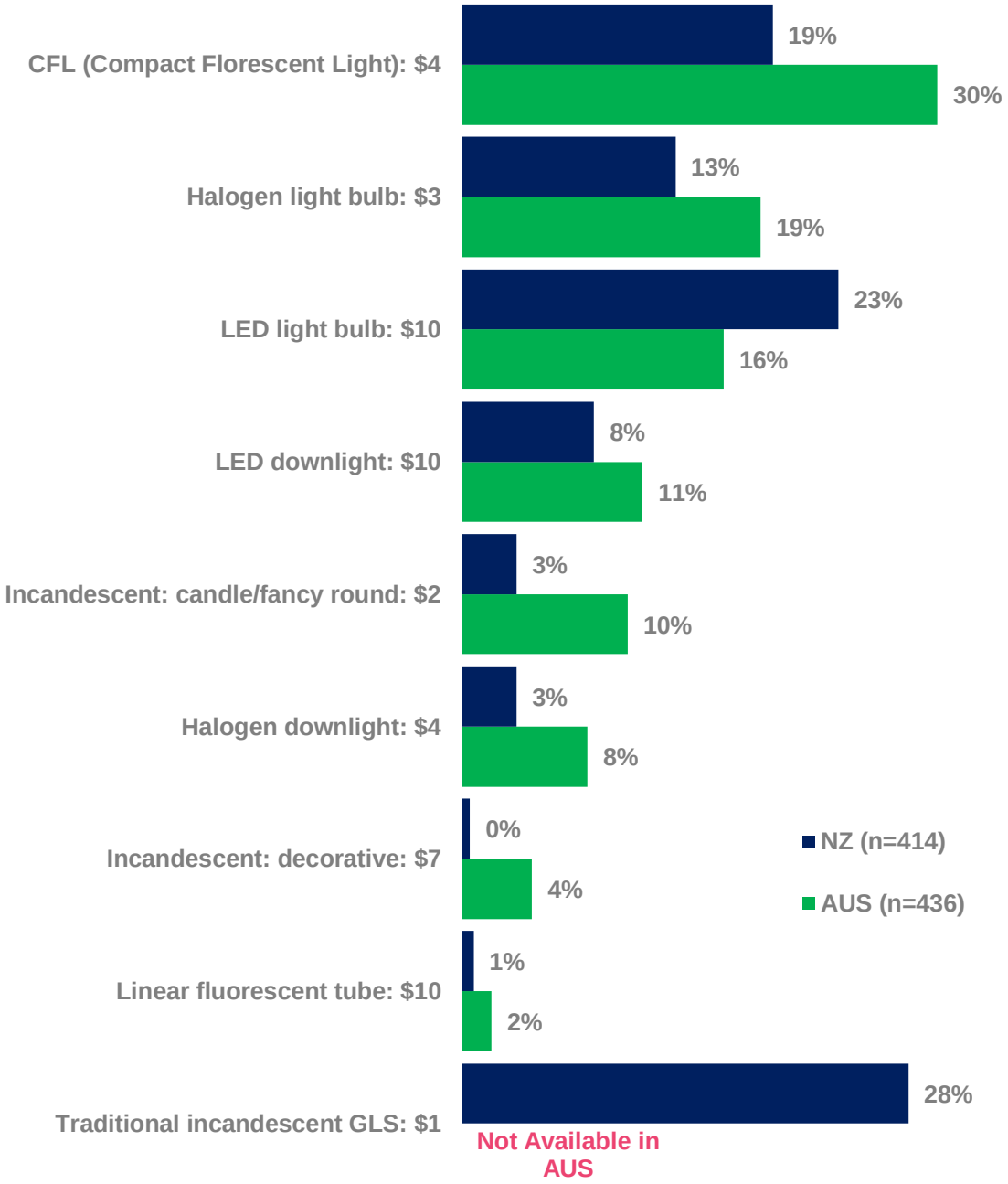
Replacement bulb preferences

When asked to indicate which bulb they would choose when replacing an existing one in their home, some differences emerge between Australians and New Zealanders.

The most popular choice among Australians were CFL bulbs at almost one-third (30%), while this was true of one-fifth for New Zealanders (19%).

New Zealanders most commonly desire traditional incandescent bulbs, with over one-quarter choosing these (28%). LED bulbs were the second most popular choice at slightly under one-quarter (25%). Comparatively, Australians selected LED bulbs one-sixth of the time (16%).

Overall, halogen downlight, decorative incandescent and fluorescent tube bulbs were the least popular choices across both countries, though more Australians select these compared to New Zealanders.



▲ Significantly HIGHER compared to total at 95% confidence.

▼ Significantly LOWER compared to total at 95% confidence.

Q18. The next time you replace one of the main light bulbs in your home, which one of the following would you choose? Please choose one of the options that best fits your experience.

Base: All respondents

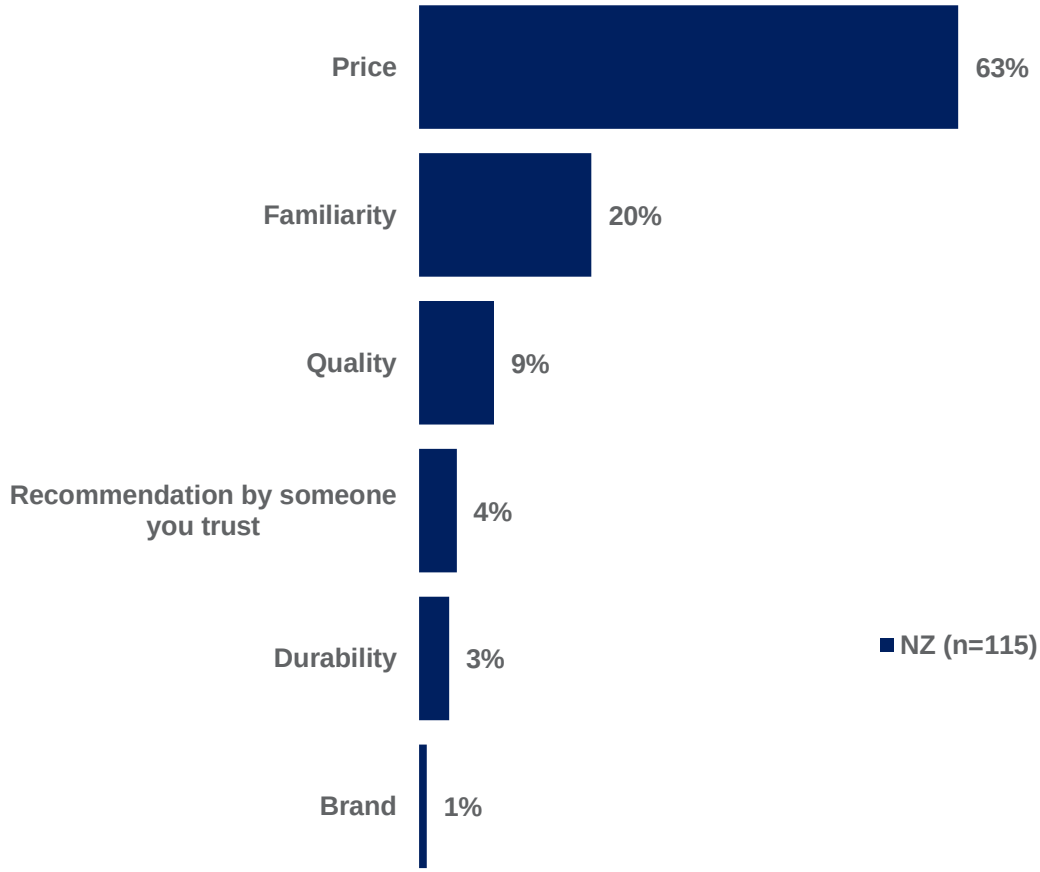
Replacement.

Traditional incandescent GLS.

For New Zealanders, price is the most critical factor in choosing a replacement globe for an incandescent GLS, with two-thirds indicating this (63%).

Familiarity is considered the most important by one-fifth of respondents (20%).

Recommendations, durability and brand are not primary considerations for the vast majority of New Zealand purchasers.



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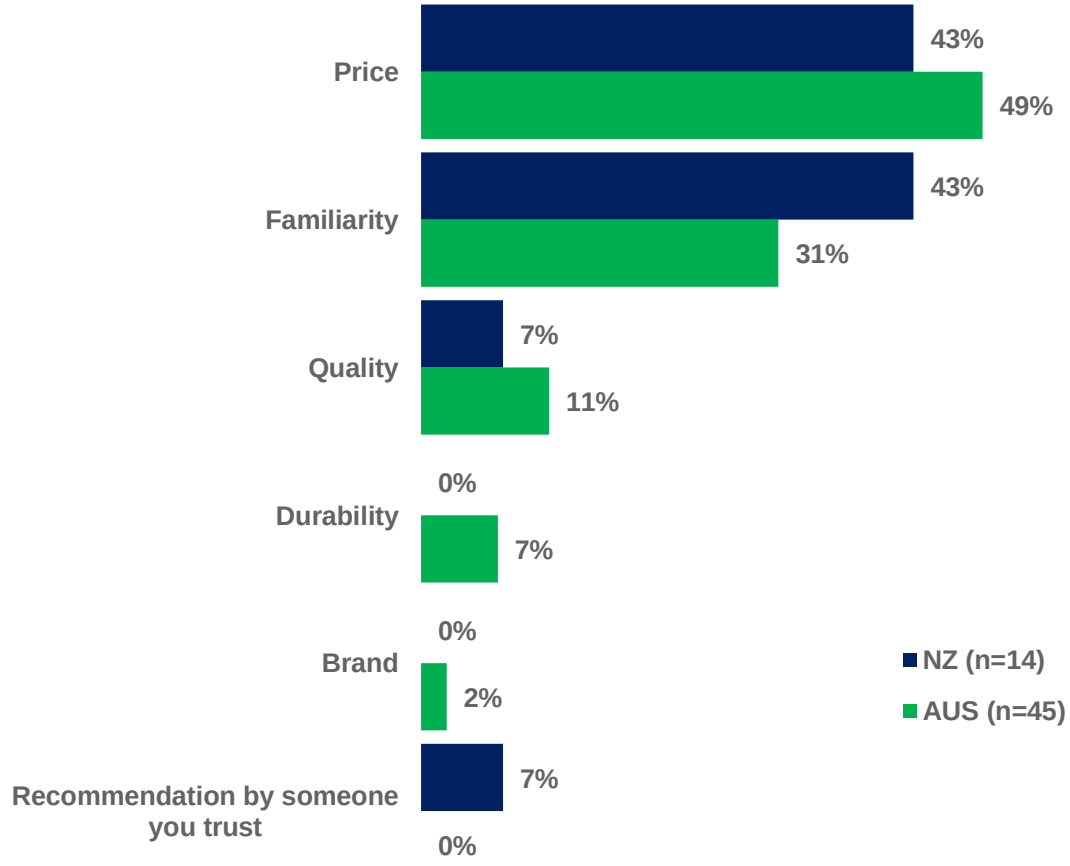
Q19 The next time you replace the Traditional incandescent GLS in your home, which one of the following would have the greatest influence on your decision?

Base: All respondents

Incandescent: candle/fancy round.

In choosing an incandescent candle/fancy round bulb to replace another, price and familiarity are the most important influences overall. Australians are slightly more likely to prioritise price (49% compared to 43% for New Zealanders), while New Zealanders more commonly value familiarity (43% compared to 31%).

Durability and brand are not a factor for any New Zealand purchasers, while the same is true of recommendations for all Australians.



▲ Significantly HIGHER compared to total at 95% confidence.

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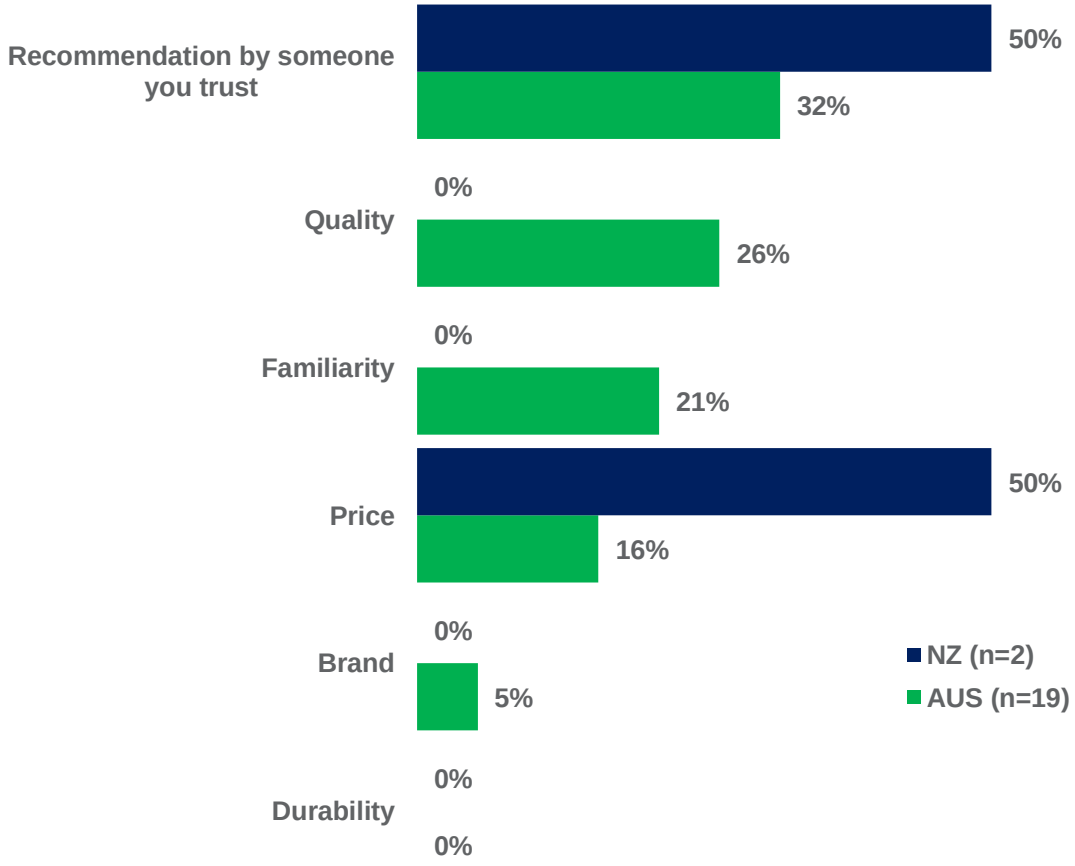
Q19 The next time you replace the Incandescent: candle/fancy round bulb in your home, which one of the following would have the greatest influence on your decision?

Base: All respondents

Incandescent: decorative.

Unlike traditional and candle/fancy round incandescent bulbs, recommendations from trusted people are a factor in choosing decorative incandescent bulbs.

Price is also important to New Zealanders.



▲ Significantly HIGHER compared to total at 95% confidence.

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Q19 The next time you replace the Incandescent: decorative bulb in your home, which one of the following would have the greatest influence on your decision?

Base: All respondents* very small base, findings are indicative only

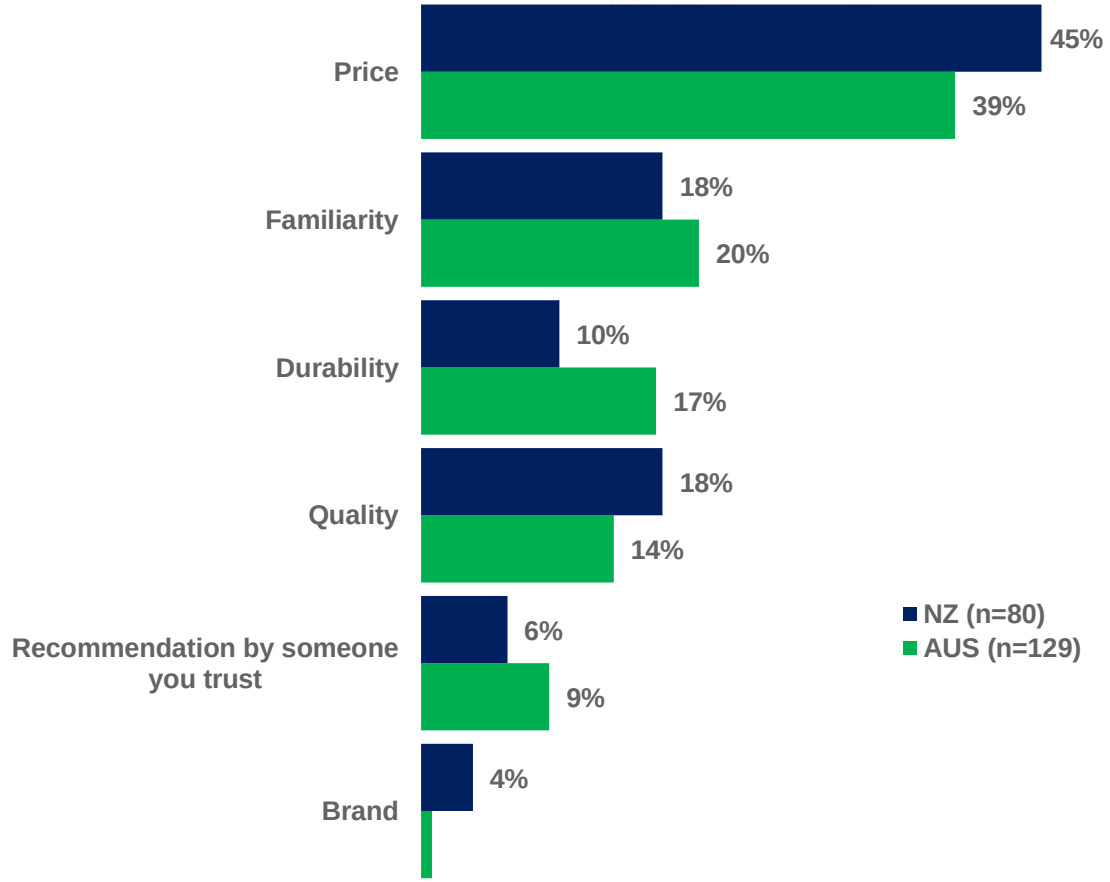
CFL (Compact Florescent Light).

The priorities of Australian and New Zealand buyers are relatively similar in regards to CFL bulbs.

Price is considered the critical factor by almost half of New Zealanders and two-fifths of Australians (45% and 39% respectively). Familiarity is important to around one-fifth of each group, slightly more so for Australians (18% and 20% respectively).

Similarly, more Australians than New Zealanders favour durability (17% compared to 10%).

Recommendations and brands are not considered important by the majority of respondents.



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Q19 The next time you replace the CFL (Compact Florescent Light) in your home, which one of the following would have the greatest influence on your decision?

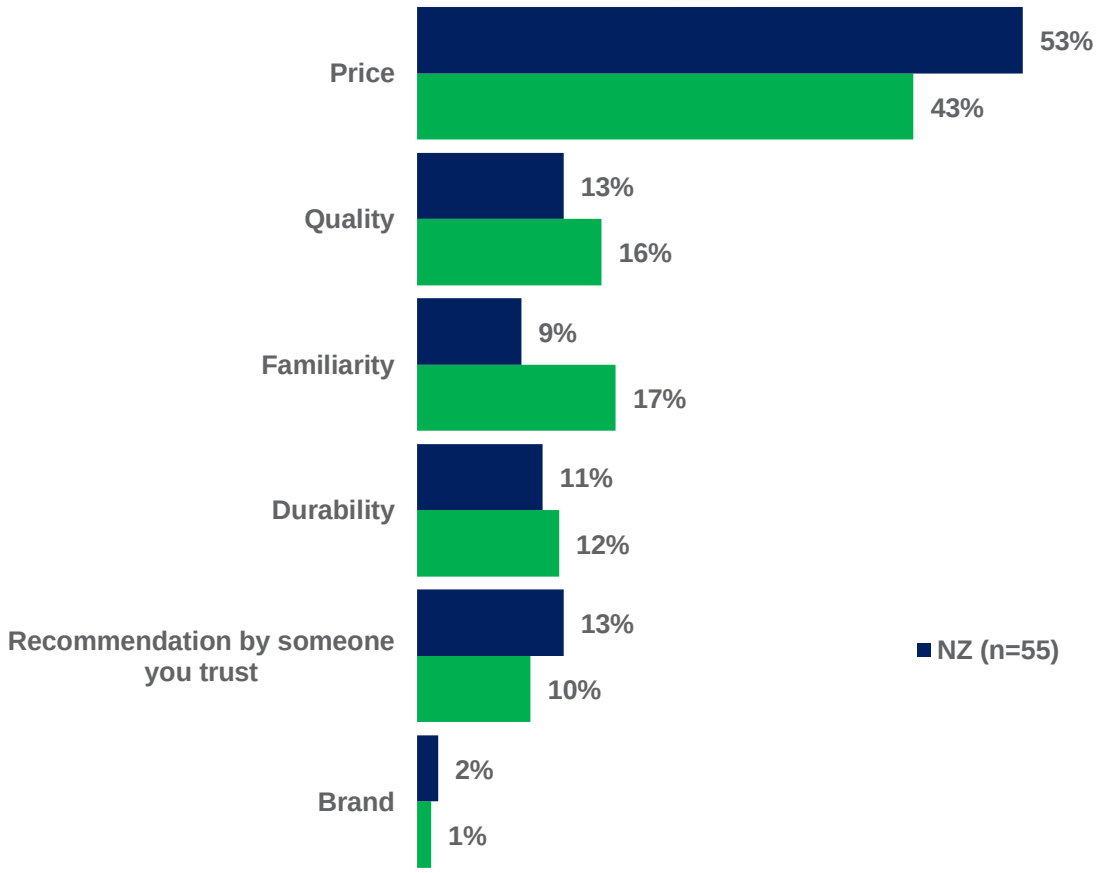
Base: All respondents

Halogen light bulbs.

Once again, considering replacing a halogen light bulb, just over half of New Zealanders and two-fifths of Australians believe price to be the greatest influence on their decision (53% and 43% respectively).

This is the most significant element, followed by familiarity and quality for Australians (17% and 16% respectively) and quality and recommendation for New Zealanders (13% each).

Brand is not a consideration for many respondents of either country.



▲ Significantly HIGHER compared to total at 95% confidence.

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Q19 The next time you replace the Halogen light bulb in your home, which one of the following would have the greatest influence on your decision?

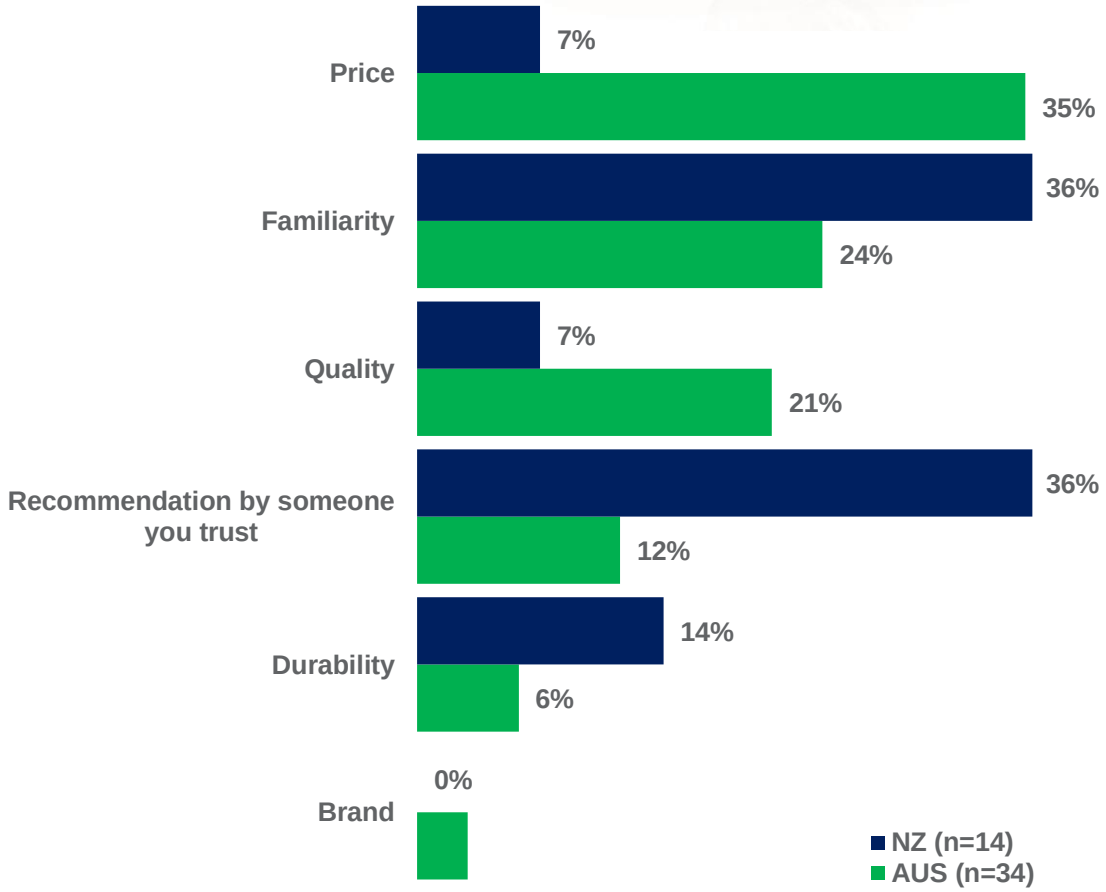
Base: All respondents

Halogen downlights.

Australians and New Zealanders vary in their priorities when choosing halogen downlights, particularly in areas of price and recommendation.

Price is most important factor for over one in three Australians (35%) compared to one in fourteen New Zealanders (7%). Similarly, quality is the primary consideration for one in fourteen New Zealanders, while one in five Australians indicate the same (7% and 21% respectively).

New Zealand purchasers value recommendations and familiarity the most (36% each). One-eighth of Australians prioritise the former, while one-quarter choose the latter (12% and 24% respectively).



▲ Significantly HIGHER compared to total at 95% confidence.

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Q19 The next time you replace the Halogen downlight in your home, which one of the following would have the greatest influence on your decision?

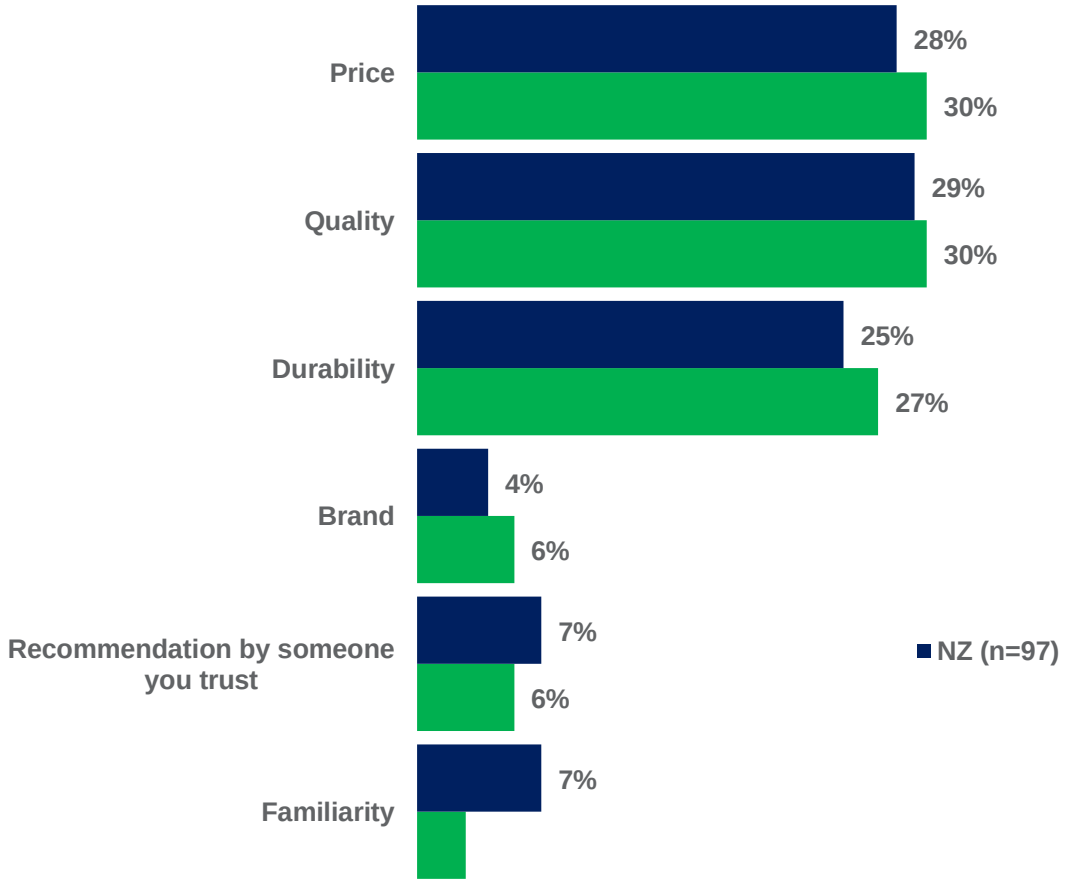
Base: All respondents** low base size

LED light bulbs.

Priorities are relatively consistent across both countries in regards to LED light bulb selection.

Quality and price are near even as the most common choice: three-tenths of Australians see these as the most important (30% each), and the same proportion of New Zealanders say the same (29% and 28% respectively). Durability is a critical factor for one-quarter of each group (25% of Australians, 27% of New Zealanders).

Few respondents of either country believe brand, recommendation or familiarity to be the most important to their choice.



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Q19 The next time you replace the LED light bulb in your home, which one of the following would have the greatest influence on your decision?

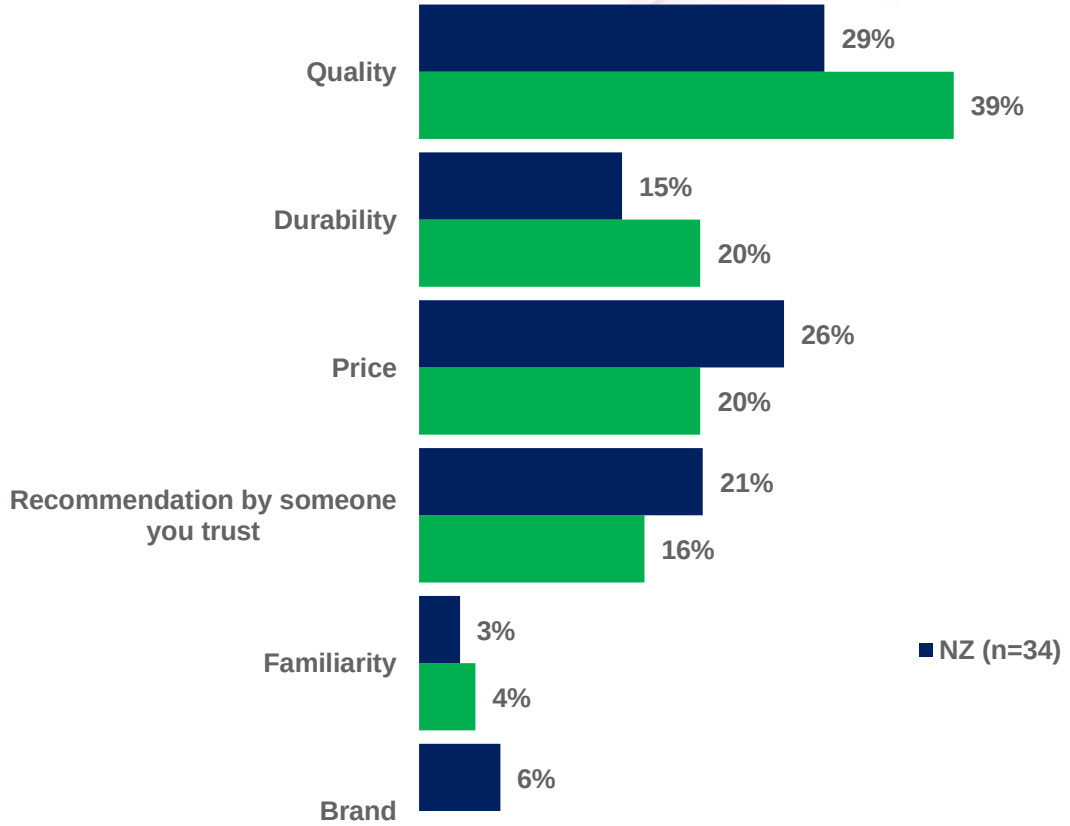
Base: All respondents

LED Downlights.

Quality is considered important by two-fifths of Australians, compared to under one-third of New Zealanders (39% vs. 29%). They are also more commonly concerned with durability, with one-fifth viewing this as critical (20%).

New Zealanders prioritise price more frequently than Australians do (26% compared to 20%), and the same is true for recommendations (21% compared to 16%).

Familiarity and brand are considered the least critical across both countries.



▲ Significantly HIGHER compared to total at 95% confidence.

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Q19 The next time you replace the LED Downlight in your home, which one of the following would have the greatest influence on your decision?

Base: All respondents

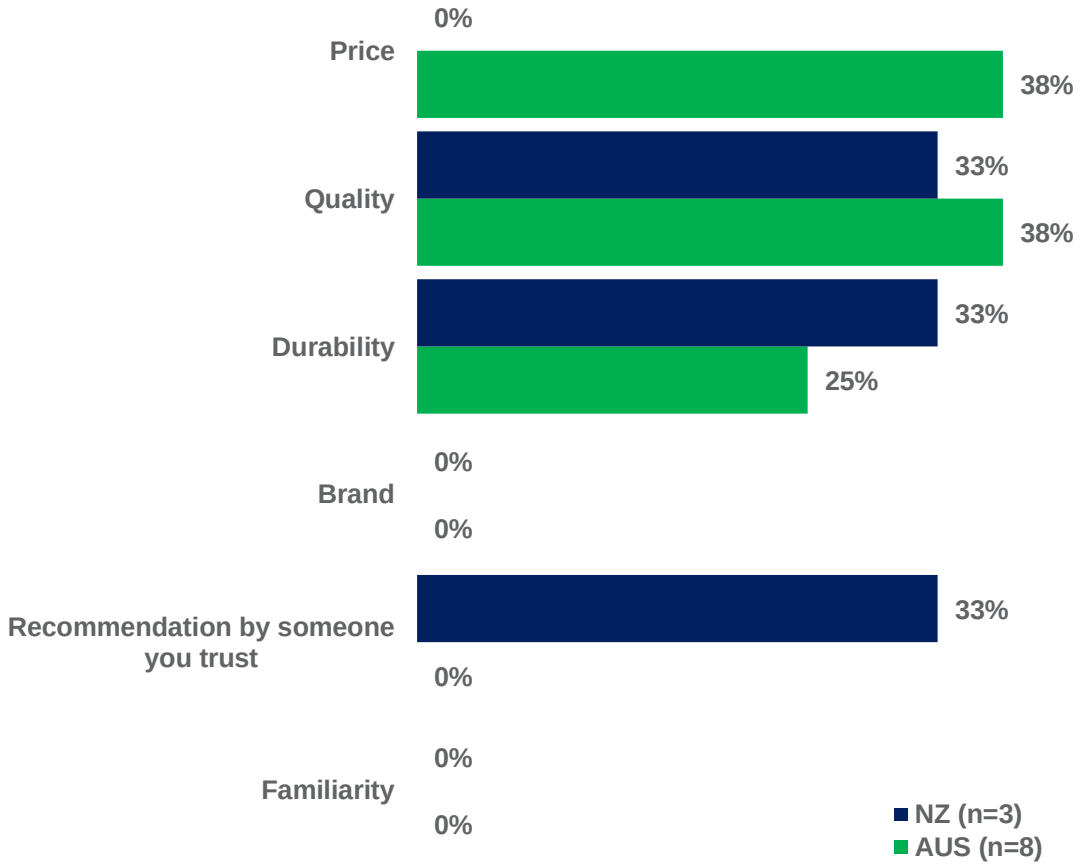
colmar brunton.

Linear fluorescent tube.

One-third each of New Zealanders perceive quality, durability and recommendations to be the greatest influence on their purchase decision (33% each). While no Australians consider recommendations important, one-quarter prioritise durability (25%) and two-fifths prioritise quality (38%).

Price is a deciding factor for a further two-fifths of Australians, whereas no New Zealanders indicate that they would choose this type of bulb based on price (38% vs. zero).

No respondents of either country are swayed significantly by brand and familiarity (zero each).



▲ Significantly HIGHER compared to total at 95% confidence.

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Q19 The next time you replace the Linear fluorescent tube in your home, which one of the following would have the greatest influence on your decision?

Base: All respondents** very low base size results are indicative only

Light Bulb Packaging.

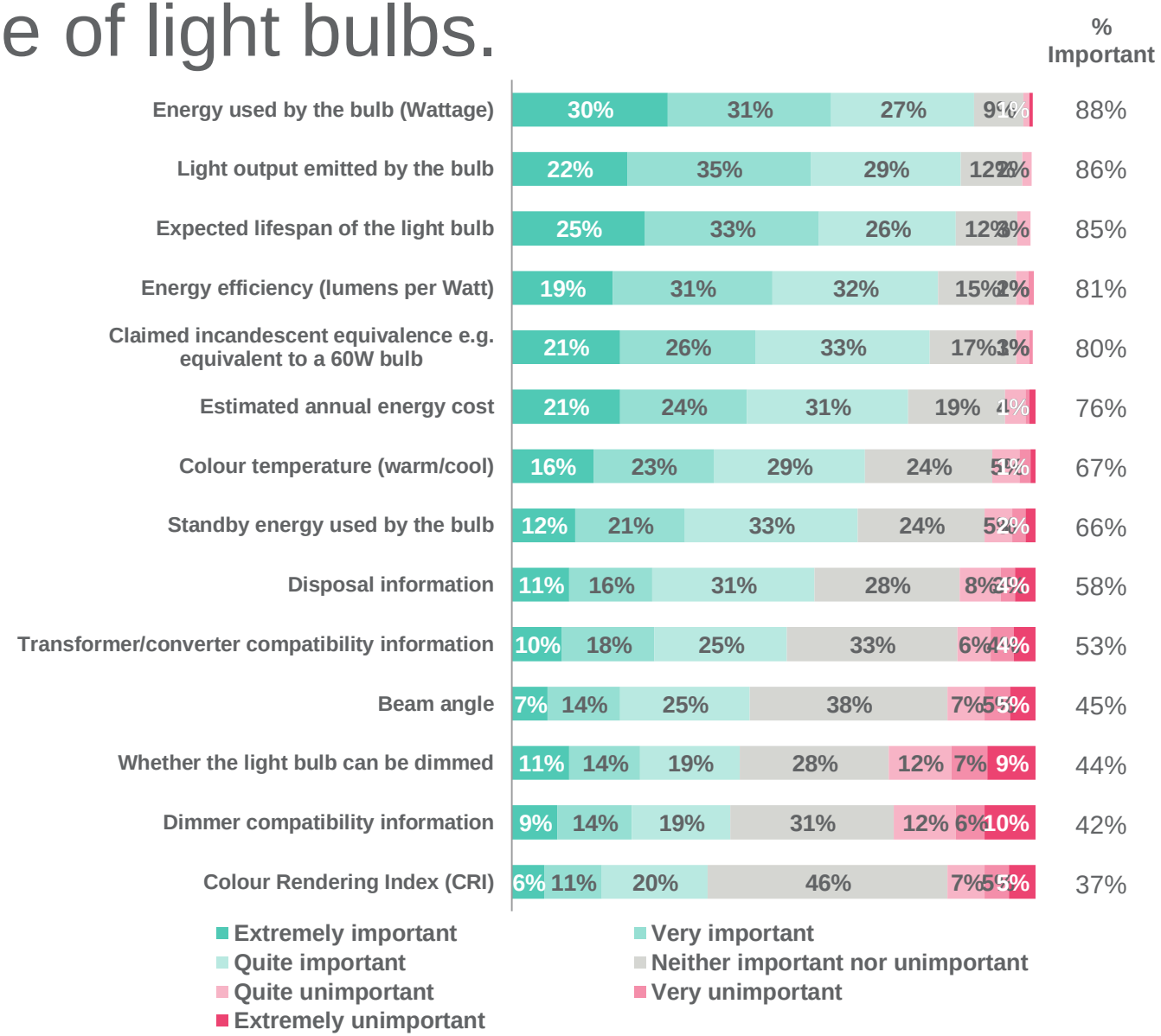
Australian consumers place the most importance on knowing the wattage of light bulbs.

Nine in ten Australians consider it to be important for light bulb packaging to communicate the power (W), the light omitted and the expected lifespan of the light bulb (88%, 86% and 85% respectively).

Four fifths of Australians also considered it important for the energy efficiency and claimed incandescent equivalence to be printed on packaging (81% and 80% respectively).

Three quarters would also like to see the estimated annual electricity cost reflected on packaging (76%).

Over one quarter of Australians do not consider the ability to dim the bulb or its compatibility information to be an important inclusion on packaging (27% and 28% respectively).



Q20-Q33. Thinking about the information that might be printed on a light bulb pack; please indicate how important each of the following items of light bulb information is most important to you?

Base: All Australian respondents N=436

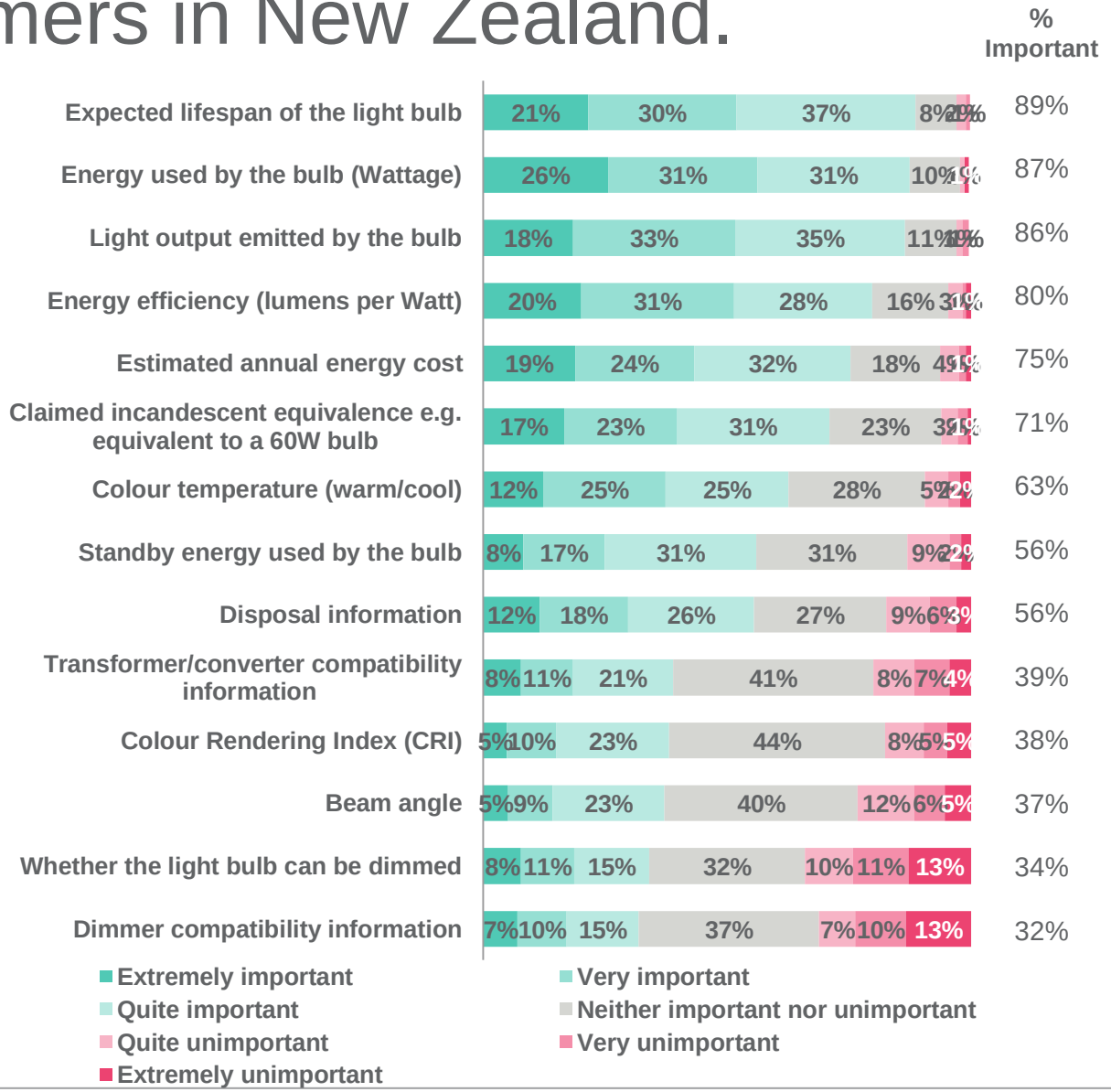
colmar brunton.

Bulb lifespan is the most important piece of information on packaging for consumers in New Zealand.

In line with the needs of Australians, nine in ten New Zealanders consider the expected lifespan of the bulb, energy use in wattage and the light emitted by the bulb to be important inclusions on light bulb packaging (89%, 87% and 86% respectively).

Four fifths of New Zealanders also considered it important for the energy (80%). While three quarters would also like to see the estimated annual electricity cost reflected on packaging (76%).

One third of New Zealanders do not consider the ability to dim the bulb, nor do three in ten, consider a bulbs dimmer compatibility information to be an important inclusion on packaging (27% and 28% respectively).



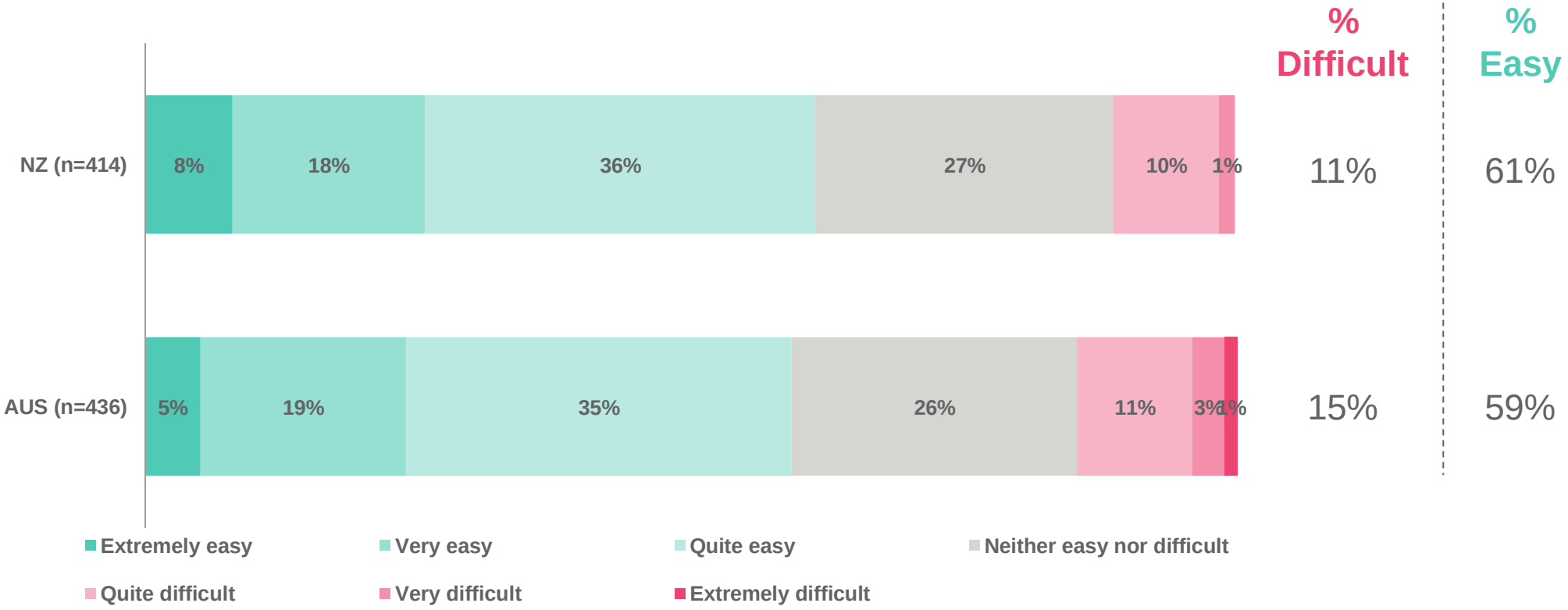
Q20-Q33. Thinking about the information that might be printed on a light bulb pack; please indicate how important each of the following items of light bulb information is most important to you?

Base: All New Zealand respondents N=414

colmar brunton.

The majority of Australians and New Zealanders currently find it easy to find bulb energy efficiency information.

However, one in ten New Zelanders (11%) and one in seven (15%) report a level of difficulty in finding light bulb energy efficiency information.



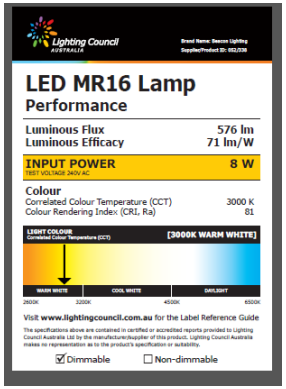
Q34. How easy or difficult is it for you to find information on the energy efficiency of light bulbs?

Base: All respondents

The survey tested two statements with consumers…

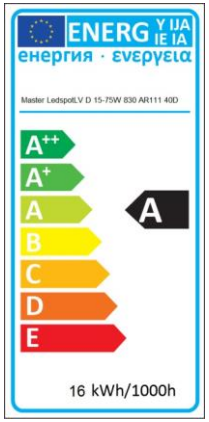
- Clearly communicates the energy efficiency of the light bulb.
- Clearly communicates the energy saving and cost saving of the light bulb.

Consumers were then asked to identify which of five labels most clearly communicates each statement.

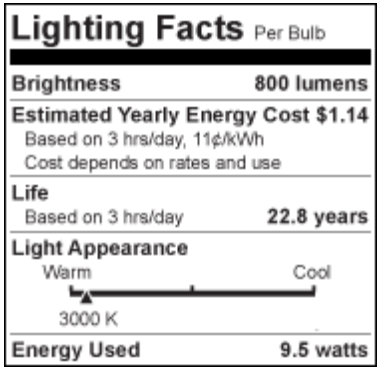


A

B



C



D

E

colmar brunton.

Although no label was preferred by the majority, Label B most clearly communicated energy efficiency information.

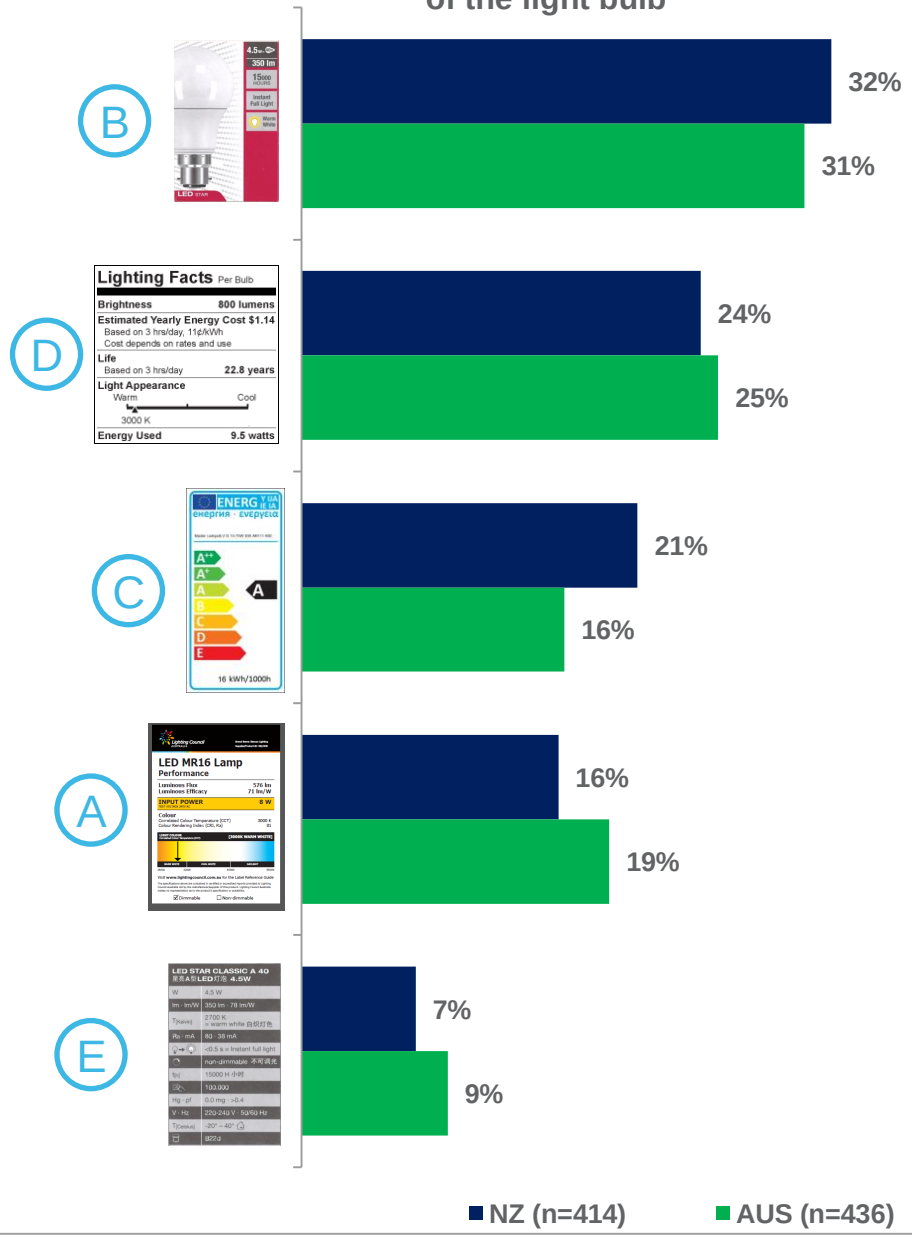
Three in ten Australians and New Zealanders chose Label B as having the greatest clarity in communicating energy efficiency information (31% and 32% respectively).

Label D was agreed by one quarter of both Australians and New Zealanders as most clearly communicating bulb efficiency (25% and 24% respectively).

Labels C and A were favoured by up to one fifth of citizens in either country, however Label C was preferred by a greater proportion of New Zealanders (21% compared with 16%). While Label A was preferred by Australians (19% compared with 16%).

Only small proportions preferred Label E in either country (9% in AU and 7% in NZ).

Label which most clearly communicates the energy efficiency of the light bulb



Q35. Thinking about the information above, please rank the labels from 1 to 5, where 1 = the label that most clearly communicates the aim and 5 is the label that least clearly communicates the aim.

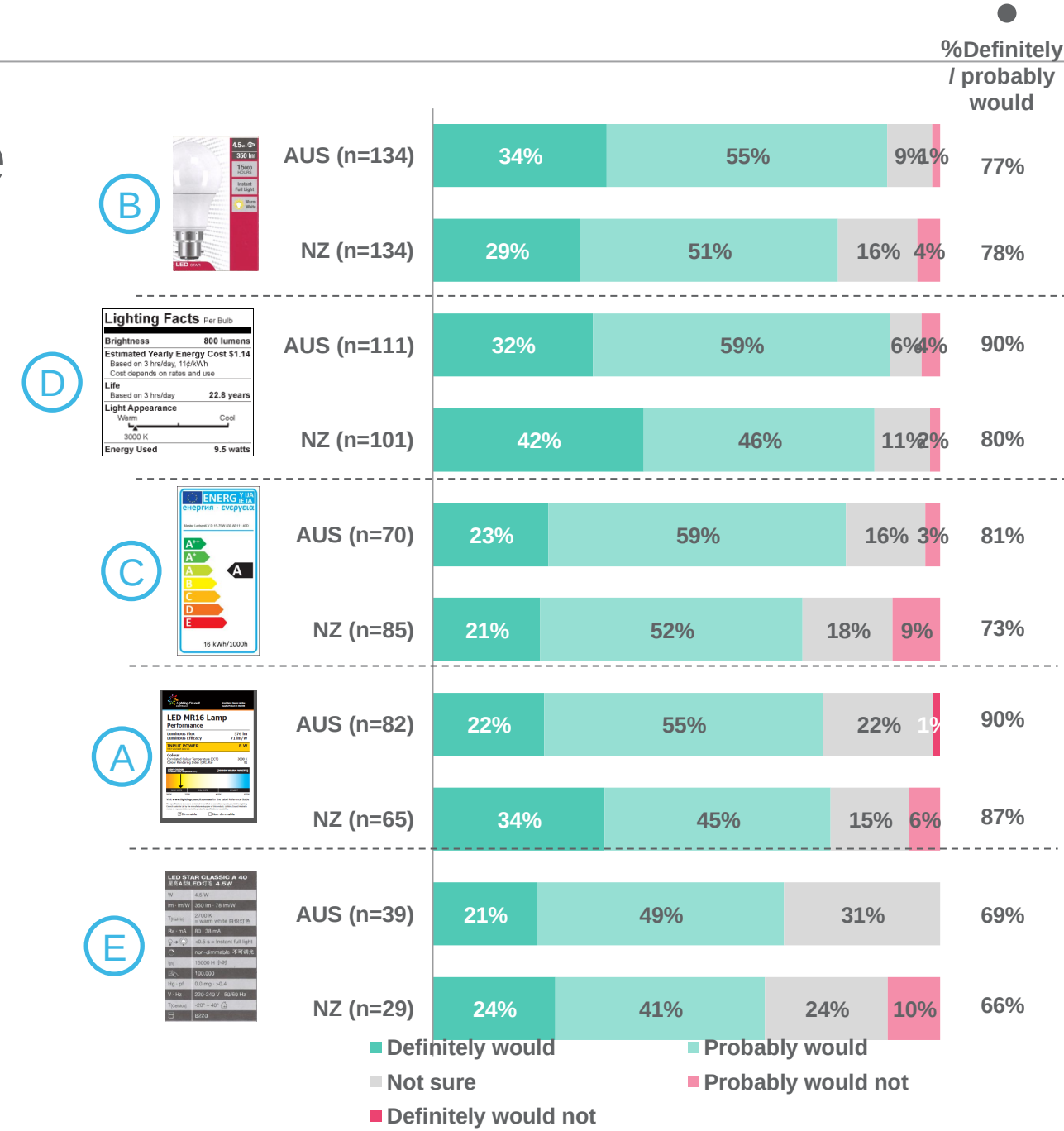
Base: All respondents

Labels B and D are the most likely to influence consumer behaviour in either country.

Nine in ten Australians (90%) and four fifths (80%) of New Zealanders believe that Label B definitely would or probably would influence their decision about the type of light bulb they were purchasing.

Similar proportions in both Australia and New Zealand agree that Label D would either definitely or probably influence their behaviour in choosing a light bulb for purchase (90% and 87% respectively).

Label E was the least likely to influence a consumers' decision when purchasing light bulbs, however the majority of those who preferred Label E still believe it would be likely to influence their behaviour.



Q36. Looking at this label <DISPLAY RANK 1>, if this was available on all light bulb packaging, to what extent would this influence your decision over which light bulb to purchase?
Aim: Clearly communicates the **energy efficiency** of the light bulb
Base: All respondents

colmar brunton.

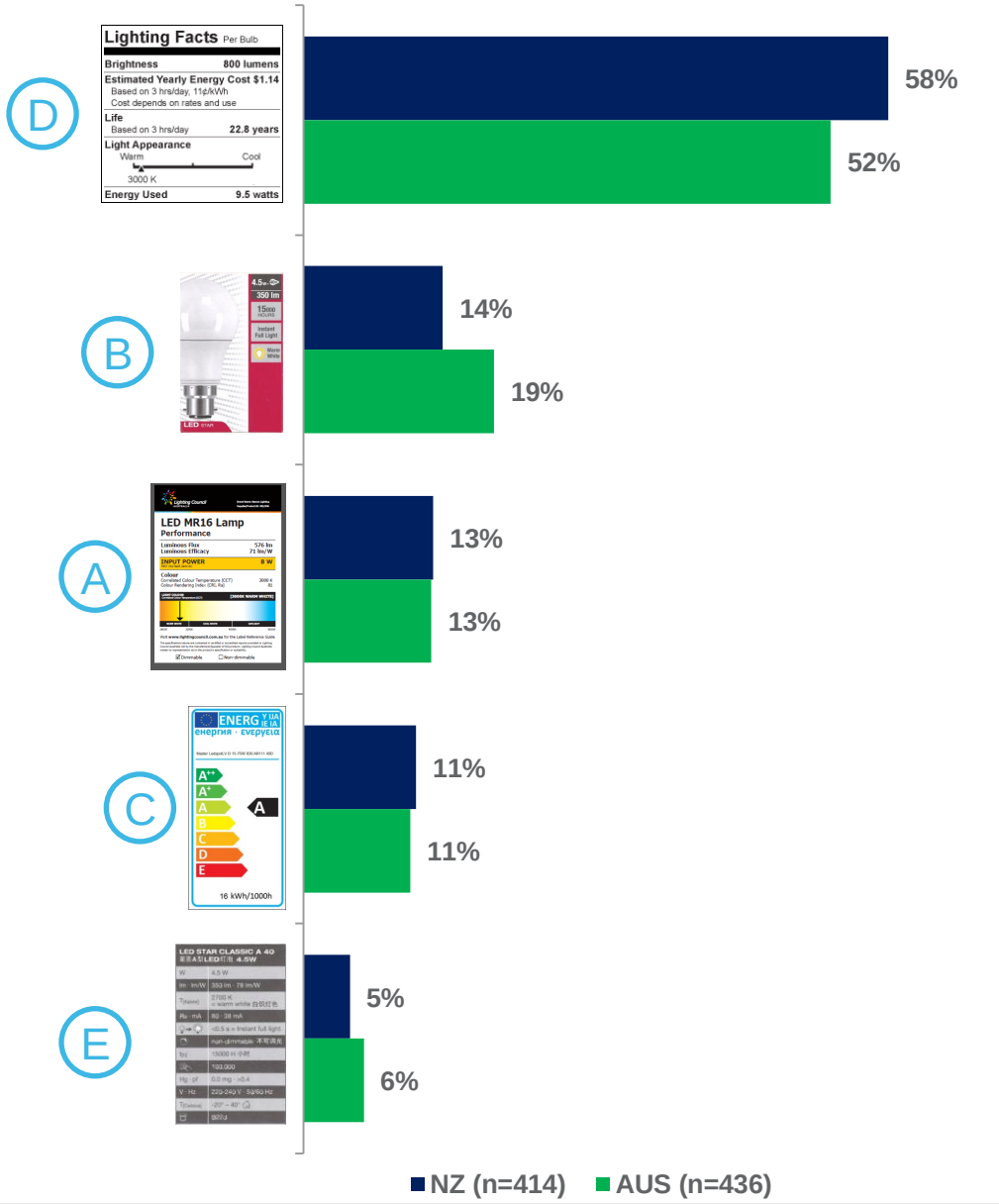
However, energy and cost saving information is communicated most clearly by Label D for the majority.

Half of Australians and three fifths of New Zealanders chose Label D as having the greatest clarity in communicating both energy and cost saving information to consumers (52% and 58% respectively).

Label B was agreed by one fifth Australians and one in seven New Zealanders as most clearly communicating the saving capabilities of bulbs (19% and 14% respectively). While one in eight, in both Australia an New Zealand felt the same about Label A.

Both Labels C and E were favoured by the smallest proportions, one in ten agreeing Label C was the clearest for energy saving information (11% each), and less again for Label E (6% AU and 5% NZ).

Label which most clearly communicates <u>energy saving and cost saving</u> of the light bulb



Q37. Thinking about the information above, please rank the labels from 1 to 5, where 1 = the label that most clearly communicates the aim and 5 is the label that least clearly communicates the aim. RANDOMISE.

Base: All respondents

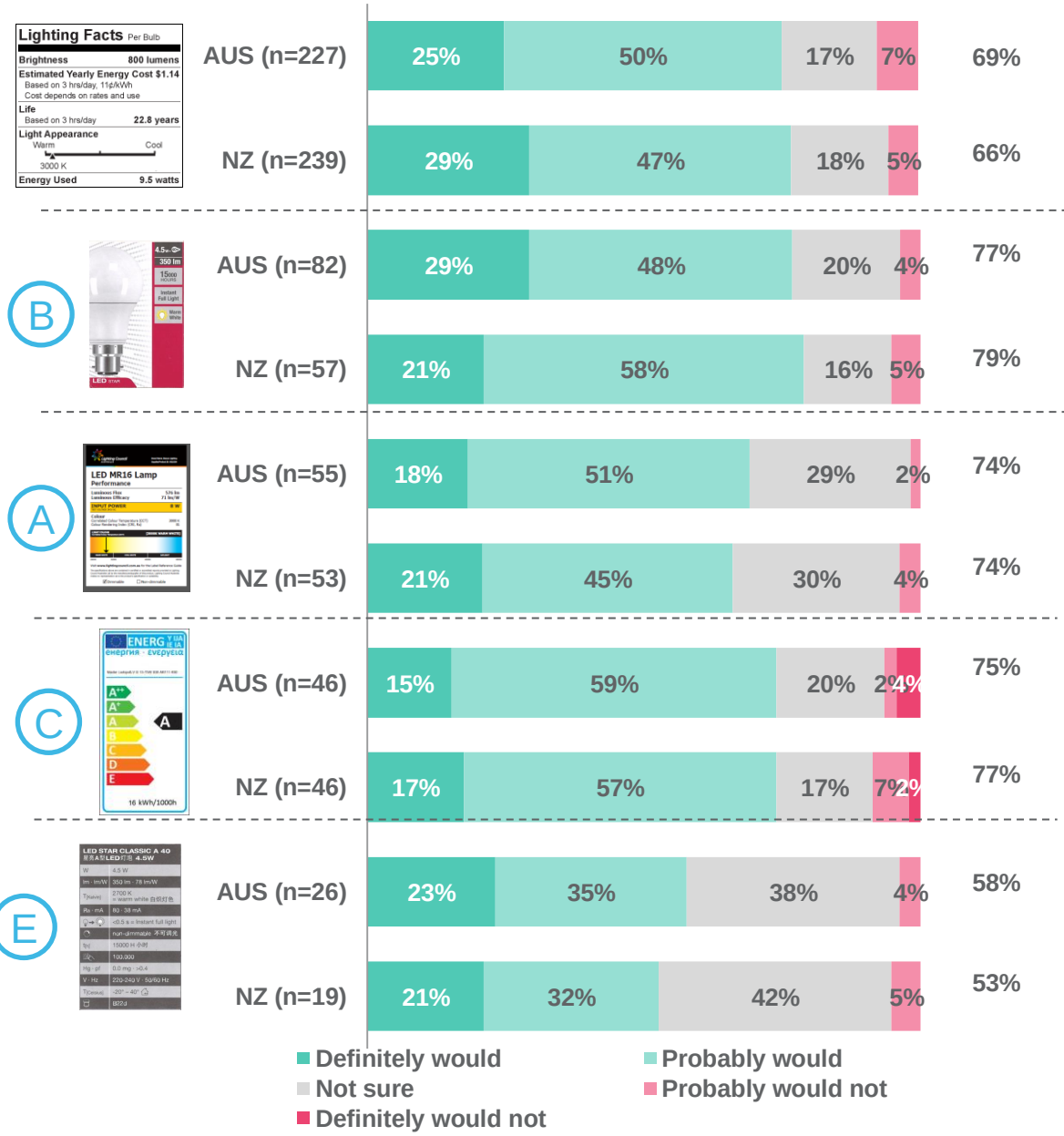
colmar brunton.

Labels B,C or D are the most likely to influence consumer behaviour in both countries.

Three quarters of both Australians and New Zealanders believe that Label B definitely would or probably would influence their decision about the type of light bulb they were purchasing (77% AU and 79% NZ). A similar proportion feel the same about Label D (75% AU and 77% NZ) and Label C (74% each).

Label A was considered to strongly influence the purchase behaviour of up to seven in ten Australians (69%) and New Zealanders (66%).

Again, Label E was the least likely to influence a consumers decision when purchasing light bulbs, however the majority of those who preferred Label E still believe it would be likely to influence their behaviour.

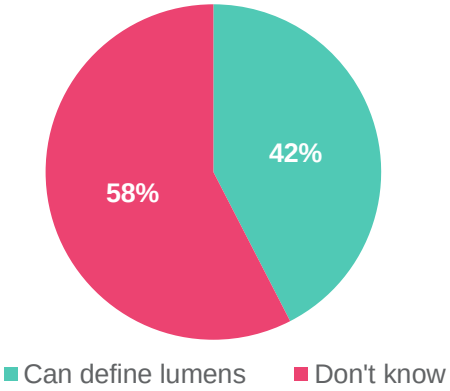


Q38. Looking at this label <DISPLAY RANK 1>, if this was available on all light bulb packaging, to what extent would this influence your decision over which light bulb to purchase?
Aim: Clearly communicates the **energy saving and cost saving** of the light bulb
Base: All respondents

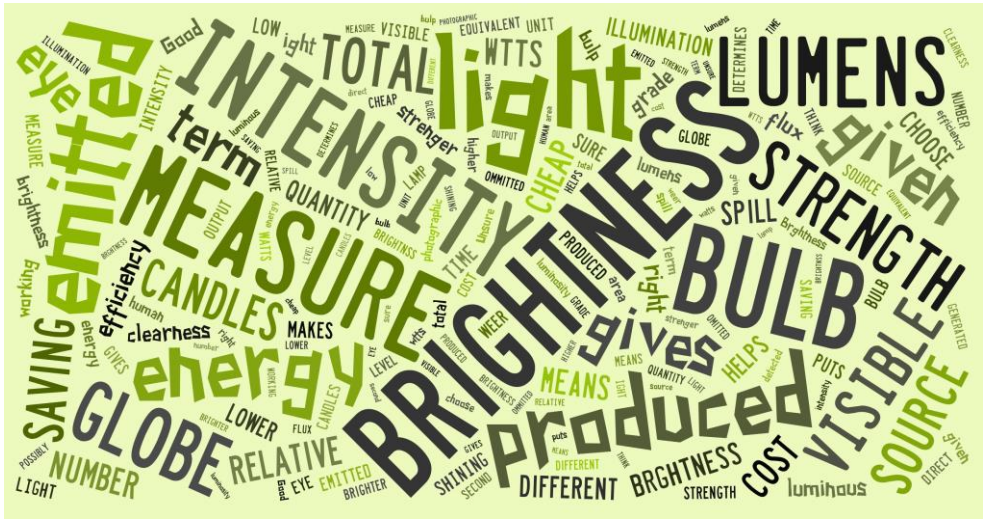
Understanding of Technical Terms.

Two fifths of Australians and half of New Zealanders claim to understand Lumens, and most commonly associate it with words such as brightness, intensity, output and measure.

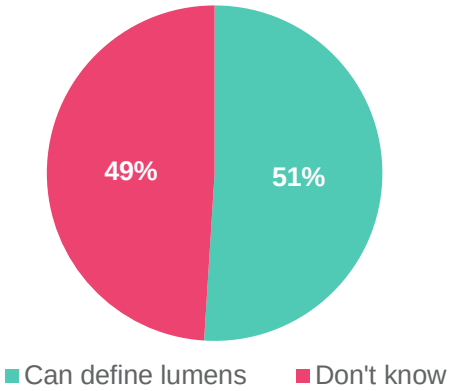
AUS (n=436)



Of the two fifths of Australians who could define lumens, words commonly used include…



NZ (n=414)



Of the half of New Zealanders who could define lumens, words commonly used include…

Q3. Please briefly describe what you understand by the term lumens, in relation to light bulbs.

Base: All respondents

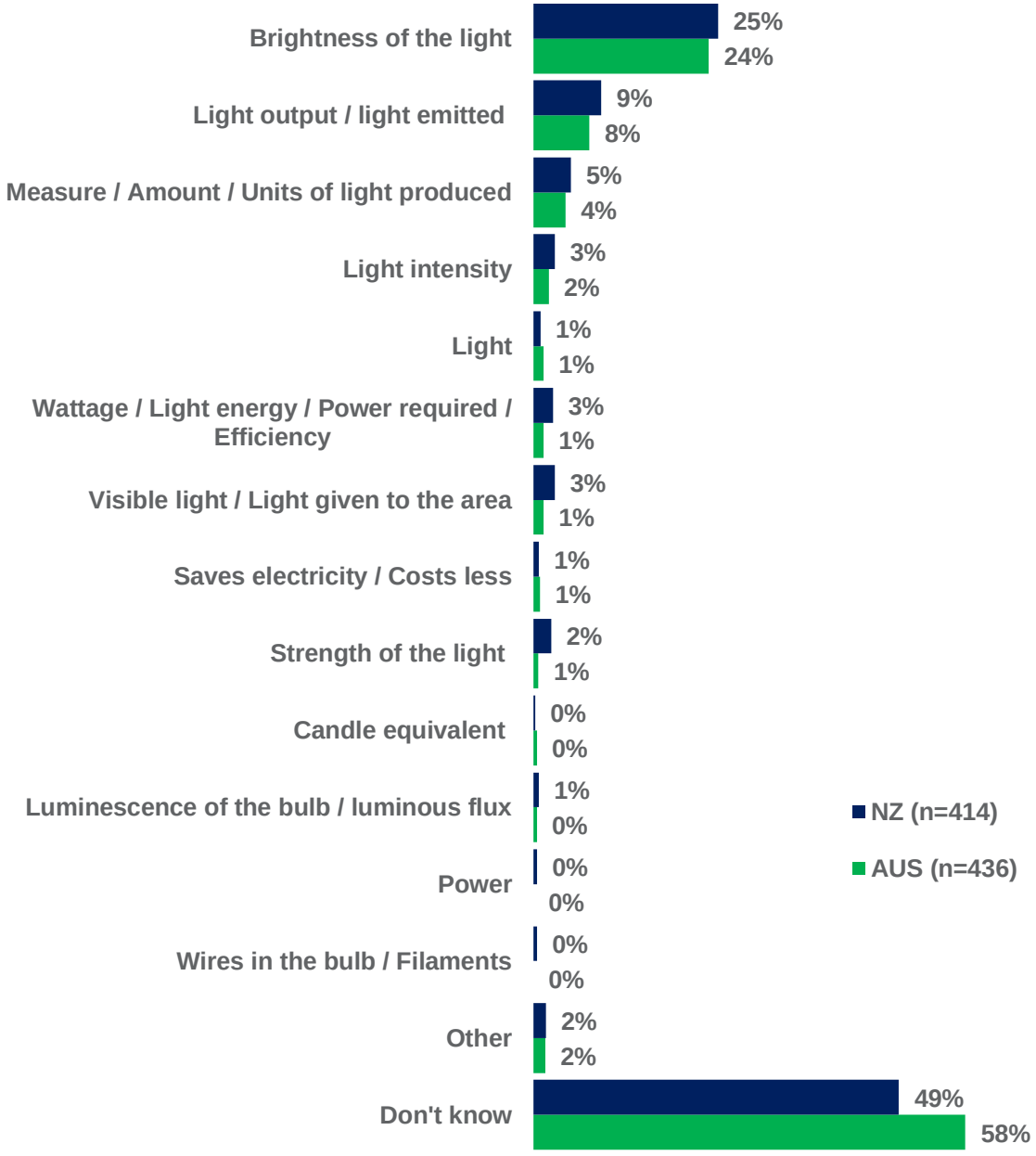
One quarter consider lumens to refer to the brightness of their light bulbs.

A quarter of New Zealanders (25%) and a similar proportion of Australians (24%) understand the term to refer to the brightness of the globe.

Similarly one in ten of both Australians and New Zealanders consider lumens to refer to the light emitted or output of the globe (9% NZ and 8% AUS).

A smaller proportion consider the term to refer a measure or unit of light produced (5% NZ and 4% AUS).

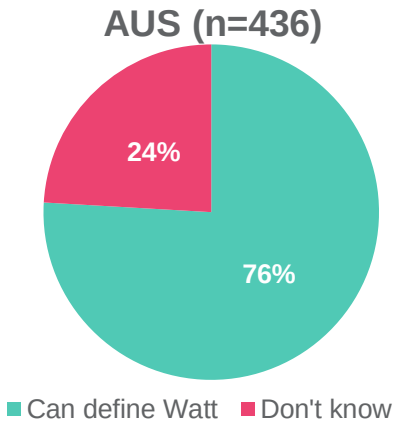
A greater proportion of Australians than New Zelanders do not know what the term lumens means in relation to light bulbs (58% compared with 49%).



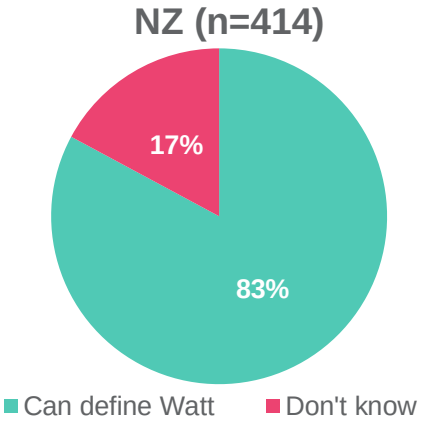
Q3. Please briefly describe what you understand by the term lumens, in relation to light bulbs.

Base: All respondents

The majority understand Watt to be related to energy consumption, power used and brightness.



Of the three quarters of Australians who could define Watt, words commonly used include…



Of the four fifths of New Zelanders who could define Watt, words commonly used include…

Q4. Please briefly describe what you understand by the term Watt, in relation to light bulbs.

Base: All respondents

colmar brunton.

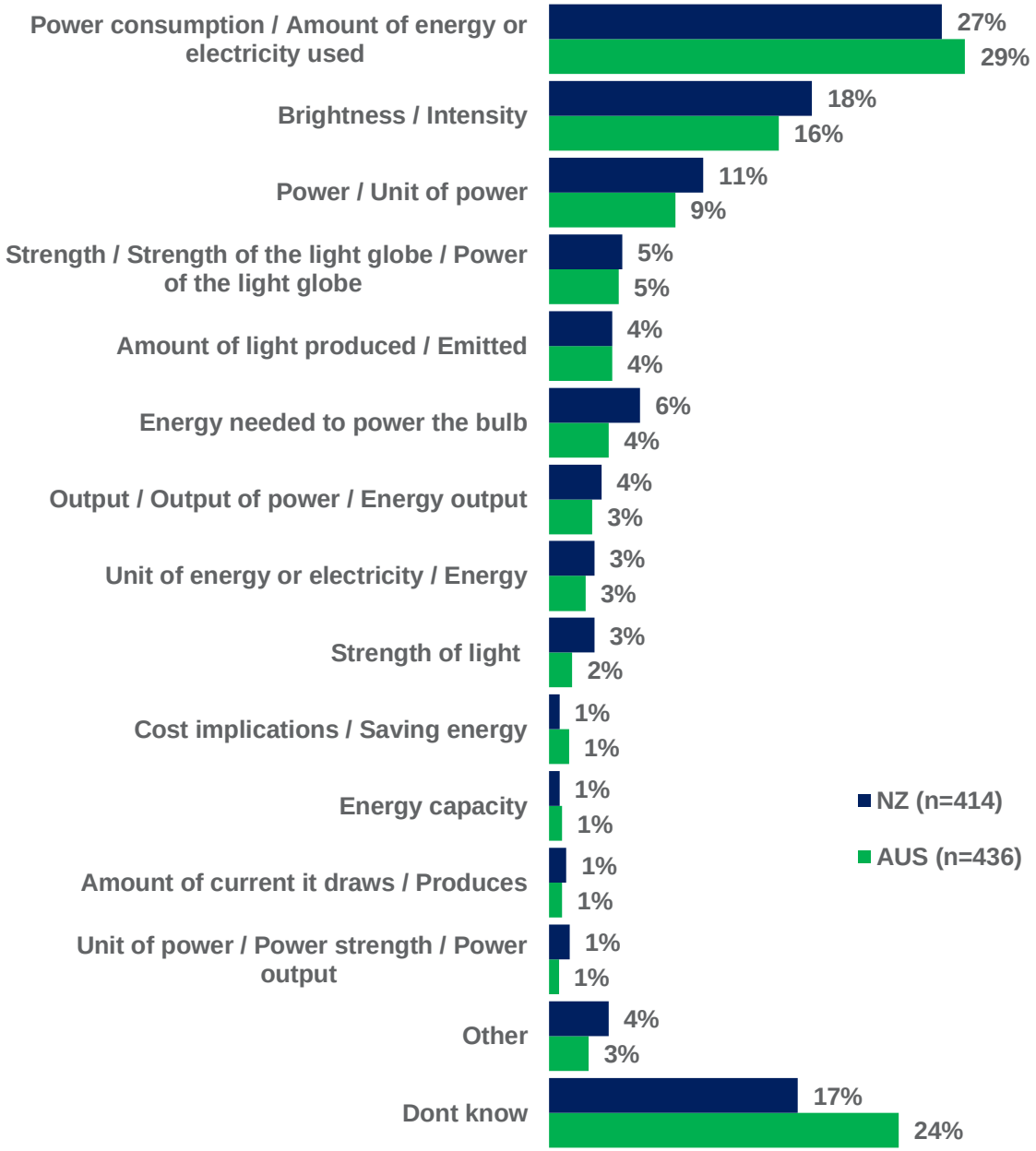
Some confusion exists for consumers for Watt in relation to bulbs

A quarter of New Zelanders and three in ten Australians believe Watt refers to the power consumption or amount of energy a light bulb uses (27% and 29% respectively).

However, a fifth in New Zeeland and one in six Australians consider Watt to refer to the brightness or intensity of the light (18% and 16% respectively).

Additionally over one in ten believe Watt to be a unit of power in relation to light bulbs (11% NZ and 9% AUS).

Compared to other terms tested, fewer in either country report they do not know the definition of Watts (17% NZ and 24% AU).

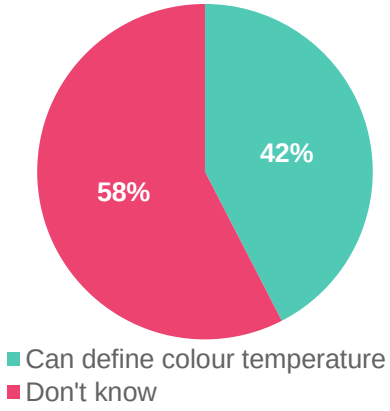


Q4. Please briefly describe what you understand by the term Watt, in relation to light bulbs.

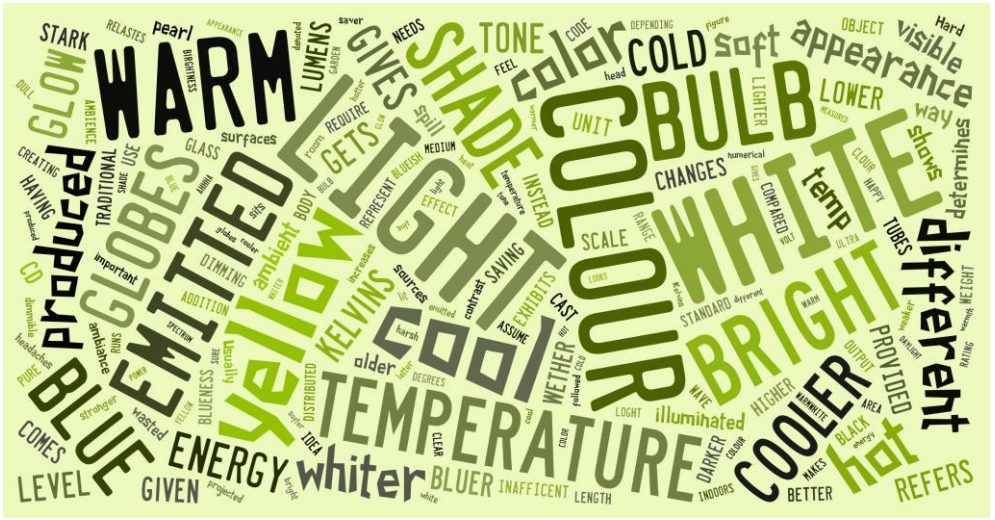
Base: All respondents

Two fifths believe colour temperature to refer to the warmth or temperature of the globe, specific colours such as white and yellow in particular.

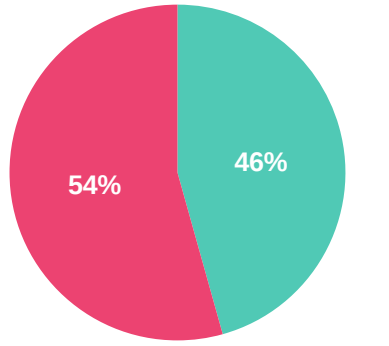
AUS (n=436)



Of the four fifths of Australians who could define colour temperature, words commonly used include…



NZ (n=414)



Over four fifths of New Zealanders could define colour temperature, words commonly used include…

Q5. Please briefly describe what you understand by the term colour temperature, in relation to light bulbs.

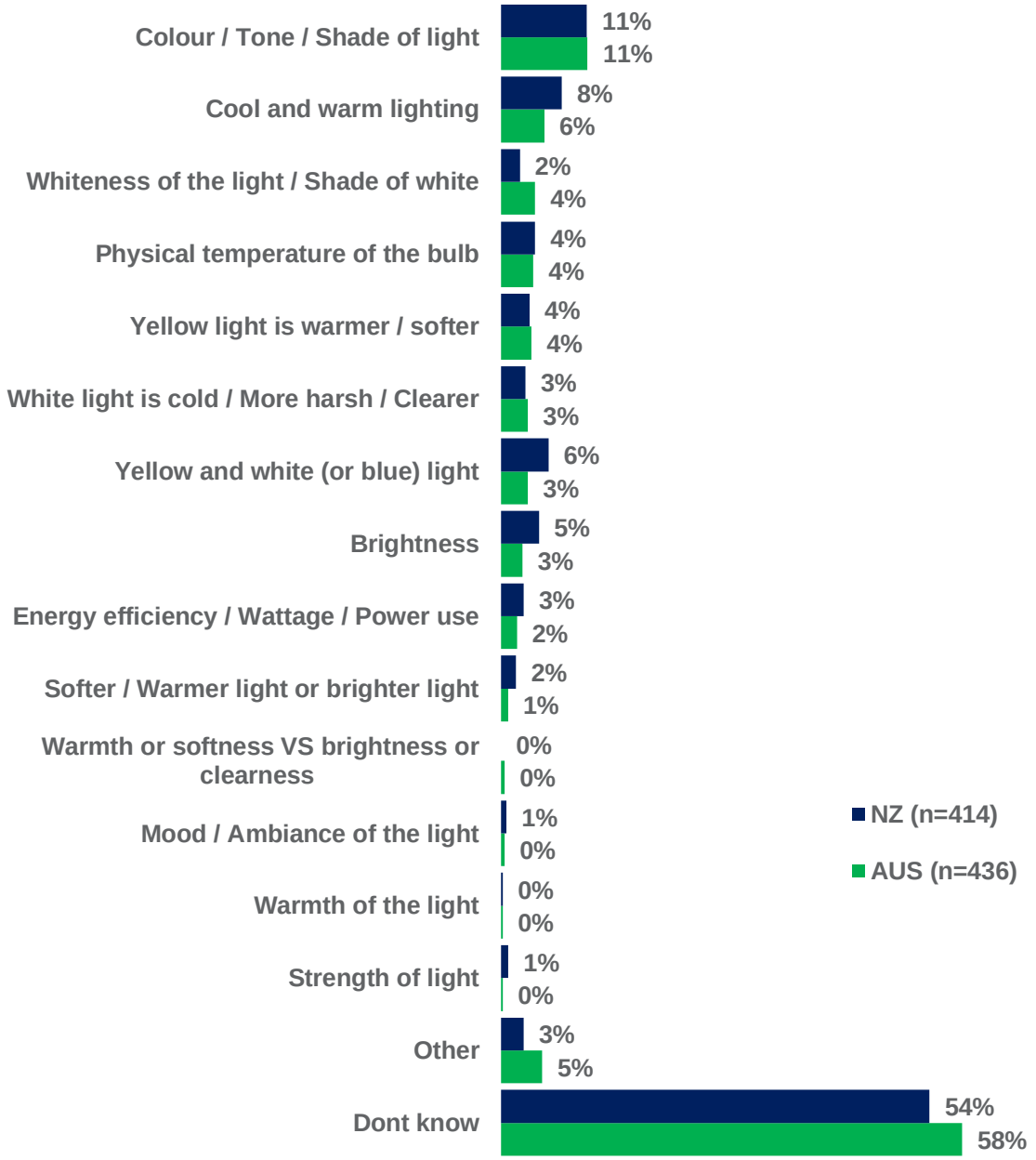
Base: All respondents

One quarter consider colour temperature to refer to the tone or shade of the light.

One in ten New Zealanders and Australians believe colour temperature to relate to the colour, tone or shade of the light (11% each).

A smaller proportion of both New Zealanders and one in eight Australians believe the term to refer to cool and warm lighting (8% and 6% respectively).

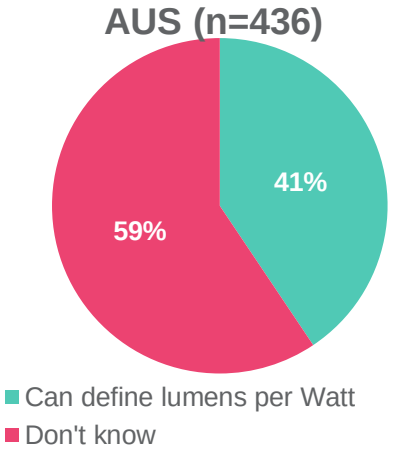
Less than one in twenty also associate colour temperature with other features including, whiteness, softness, harshness, physical temperature, or warmth of the light.



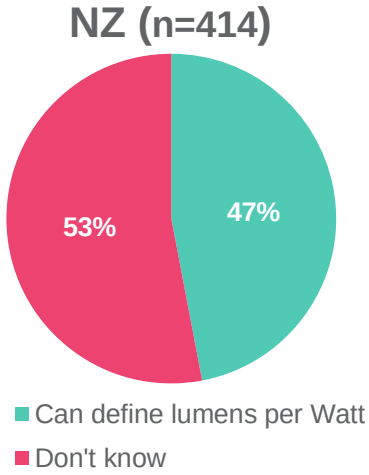
Q5. Please briefly describe what you understand by the term colour temperature, in relation to light bulbs.

Base: All respondents

Two fifths to one half claim to understand lumens per Watt, however the descriptions are less coherent, ranging across light and power.



Of the four fifths of Australians who could define lumens per Watt, words commonly used include…



Half of New Zealanders could define lumens per Watt, words commonly used include…

Q6. Please briefly describe what you understand by the term lumens per Watt, in relation to light bulbs.

Base: All respondents

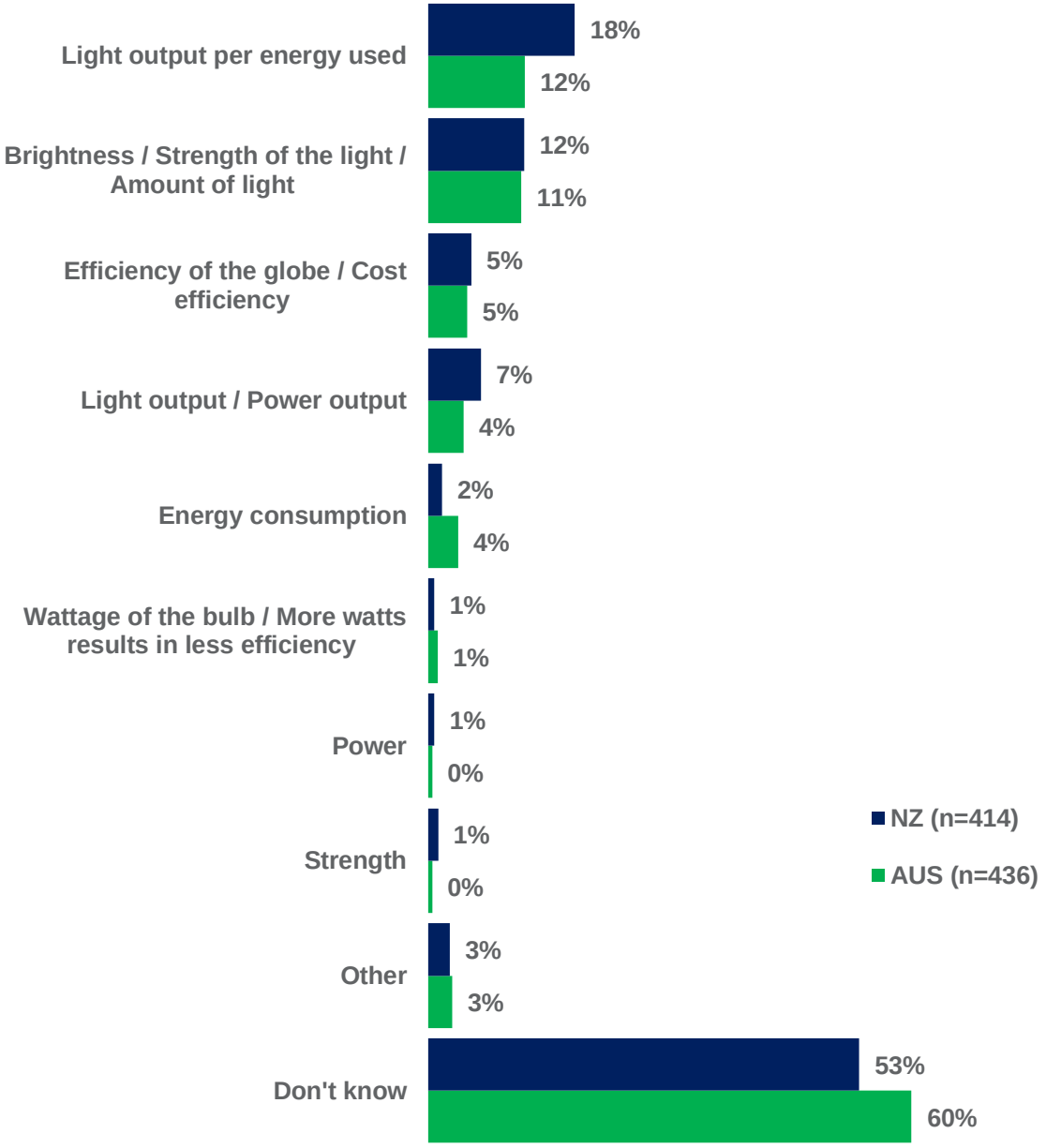
There is less clarity around the terminology of lumens per Watt.

A fifth of New Zealanders understand lumens per Watt to refer to the light output per energy used (18%), while one in eight Australians understand the same (12%).

A similar proportion of Australians however understand the term to refer to the amount of light or brightness a light bulb produces (11%). An eighth of New Zealanders also understand this to be true (12%).

One in twenty consider the term to refer to the cost efficiency of globe (5% each).

The majority in either country however admit they do not know what the term lumens per Watt means (53% NZ and 60% AUS).



Q6. Please briefly describe what you understand by the term lumens per Watt, in relation to light bulbs.

Base: All respondents

Conclusions.

Conclusions.

What role do labels play in the purchase decision?

1. Over nine in ten Australian and New Zealand consumers consider purchasing energy efficiency globes to be important to them, sentiments are stronger in Australia than New Zealand. While three quarters of consumers consider themselves to be well informed about the range of light bulb options available. The decision making process in store is very short suggesting not all factors are taken into account.

2. Among both Australians and New Zealanders, cost efficiency, necessity for a particular light fitting and habit are the most common factors in purchase decisions. Energy efficiency is a main priority when considering CFL and LED bulbs, as well as LED downlights.

3. Overall, Australians are more likely than New Zealanders to replace their light bulbs twice per year or more. The divide is most pronounced for incandescent decorative bulbs, which are changed substantially more often by Australians. The most frequently replaced across both countries are traditional and candle/fancy round incandescent bulbs, while the least often replaced are the LED and linear fluorescent tube bulbs.

4. Participants judge value for money relatively consistently, regardless of country. This is perceived to be best in LED bulbs and linear fluorescent tubes in accordance with their low rate of bulb change. New Zealanders, however, predominantly see traditional incandescent GLS bulbs to be cost efficient despite reporting them to be the most commonly replaced. On the other hand, incandescent decorative lights and halogen downlights are seen as providing poor value for money by many participants.

5. Given hypothetical price points for a variety of bulbs, participants indicate that they would be most likely to purchase traditional incandescent GLS bulbs (priced at $1 each) and halogen bulbs (priced at $3 each). Conversely, fewer are willing to buy LED bulbs or downlights (priced at $10 each). It would be useful in the qualitative research to further explore the price thresholds at which specific types of bulbs become too expensive.

Conclusions.

Is labelling information likely to encourage shoppers to purchase energy efficient light bulbs over standard bulbs?

6. In purchasing a replacement light bulb, the most prominent deciding factors across both groups are price, familiarity, and quality. Nine in ten Australians consider it to be important for light bulb packaging to communicate the power (W), the light omitted and the expected lifespan of the light bulb (88%, 86% and 85% respectively). Four fifths of Australians also considered it important for the energy efficiency and claimed incandescent equivalence to be printed on packaging (81% and 80% respectively). Three quarters would also like to see the estimated annual electricity cost reflected on packaging (76%).

7. Australians and New Zealanders show variation in the types of bulbs they intend to install when another needs replacement. More Australian than New Zealand respondents indicate that they would choose CFL bulbs and halogen bulbs, while New Zealanders show a preference for traditional incandescent and LED bulbs. Perhaps a reflection of the market, Candle/fancy round/decorative incandescent bulbs and halogen downlights are not often desired as replacements, but are still more popular among Australians than New Zealanders.

8. When considering how important certain types of information are on light bulb packaging, energy consumption of the globe, the light output and the expected lifespan of the globe are the most important inclusions across by New Zealand and Australia. While having a dimming feature and compatibility is less important for purchasers in either country.

The ease with which information is identified on light bulb packaging

9. When testing the labels for clear communication of energy efficiency we find that preference is mixed. Label B is preferred by three in ten, however a quarter prefer Label D and a fifth prefer Label C. When reflecting on behaviour a high proportion believe most of the Labels would influence their behaviour, however only two thirds feel this way about the most technical design of Label E. See page 80 for an introduction to each label tested.

10. When testing the labels for clear communication of energy saving AND cost saving we find that the majority prefer label D ‘Lighting Facts’, three quarters of both Australians and New Zealanders believe this label would influence their decision to purchase a light bulb.

What we recommend.

Recommendations.

Purchasers are open to energy efficiency

- The majority of consumers consider themselves well informed about light bulb options and the vast majority consider energy efficiency important to them. Therefore the development of a label that present this information is key to consumers as they spend little time in store and need to match products to their own research quickly and accurately.

Challenge old habits

- As habit is a strong influence over in-store decision-making it will be important to explore what can be done on pack to break old habits and shape new ones. As the in-store purchase decision is fast it may be that additional communications are required here.

Make the connection between frequency of purchase and value for money

- There is currently a disconnect between high frequency purchase and up-front price of low-cost bulbs. In the qualitative research it would be useful to explore what role packaging can play in highlighting the benefit of less frequent purchase from energy efficient bulbs.

Must haves for future labels

- Any future light bulb packaging should include information pertaining to the energy use, energy efficiency, light output and lifespan of the globe inside. These three pieces of information are considered the most important in similar proportions across countries. Consumers should therefore be consulted to ensure this information is communicated as clearly as possible.

Reflections on label designs

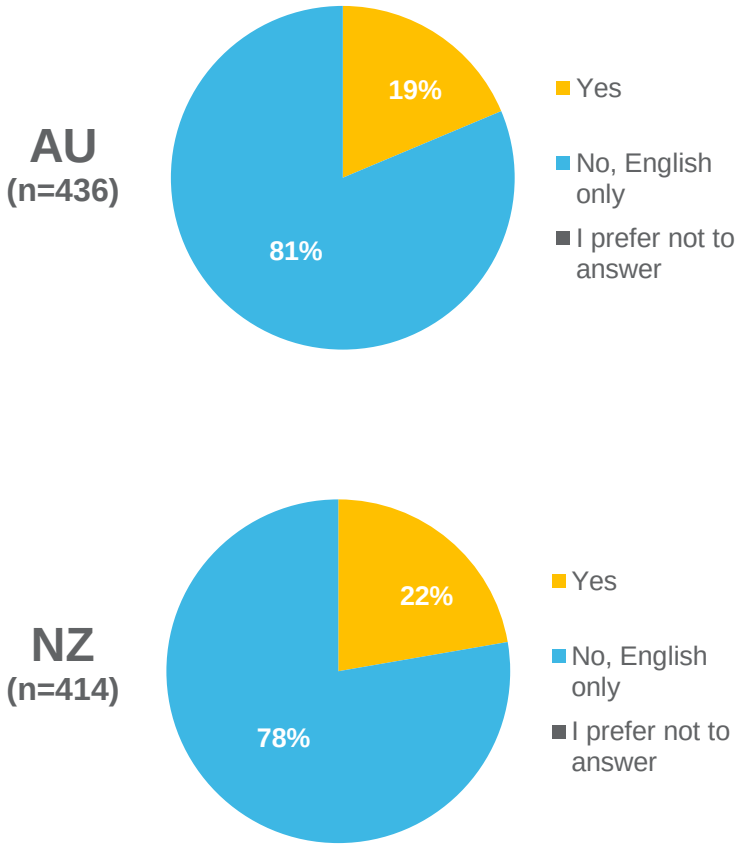
- Consumers consider Label D to communicate information on both energy efficiency and cost saving clearly, while Label B is also effective in these endeavours it is less likely to clearly communicate energy efficiency information. Therefore further investigation into particular aspects of these labels is required to find out what particular characteristics are aiding consumers in their interpretations.

Appendix.

Sample profile.

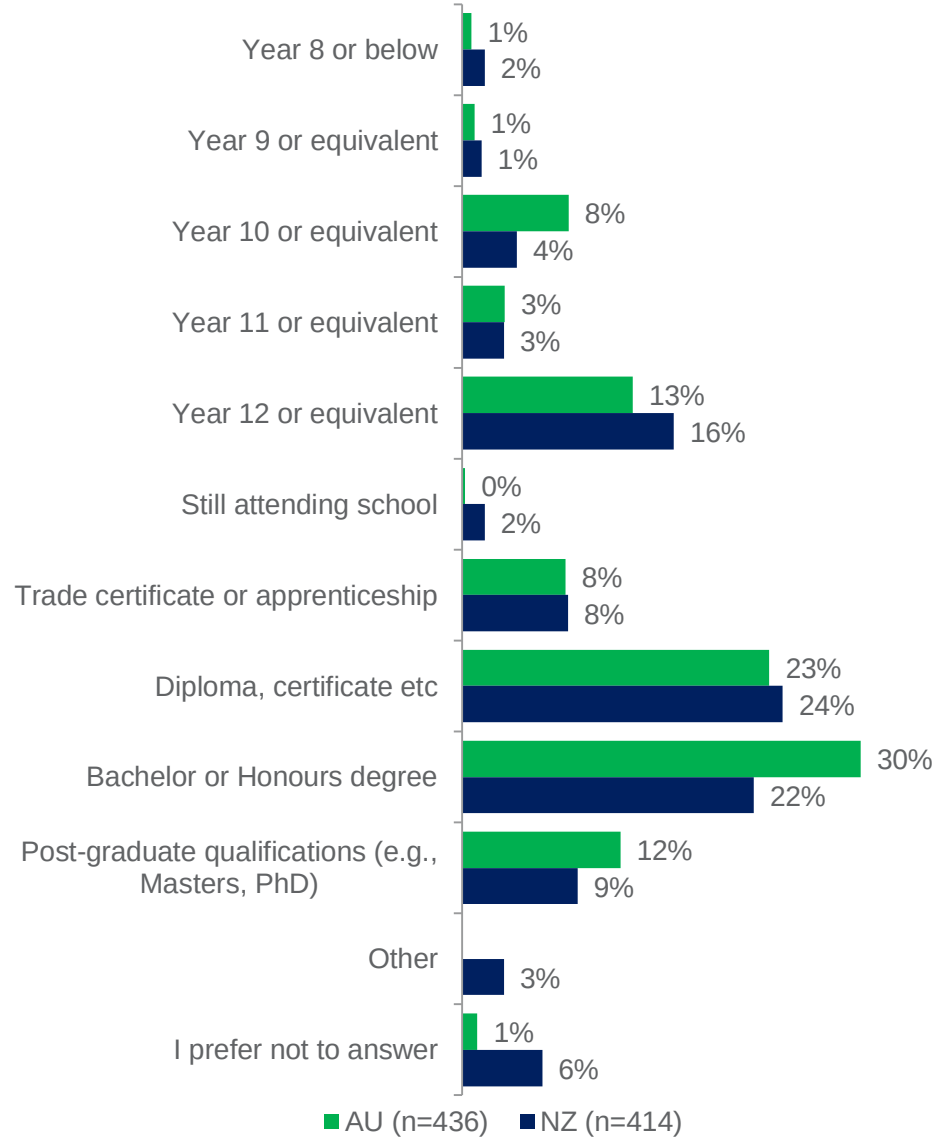
Sample demographics.

Language Spoken



D1. Do you speak a language, other than English at home?

Education Level

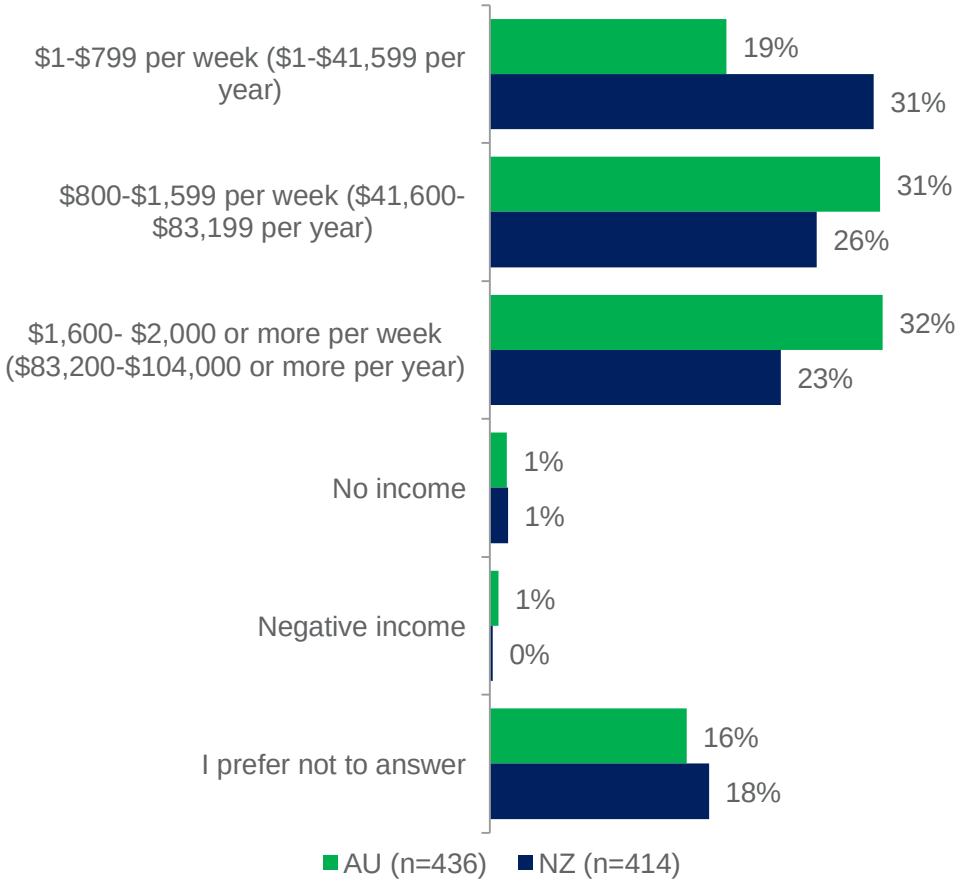


D2. What is the highest level of education you have attained?

Base: All respondents
Please note: the respondent populations skews towards the more highly educated when compared to ABS data.

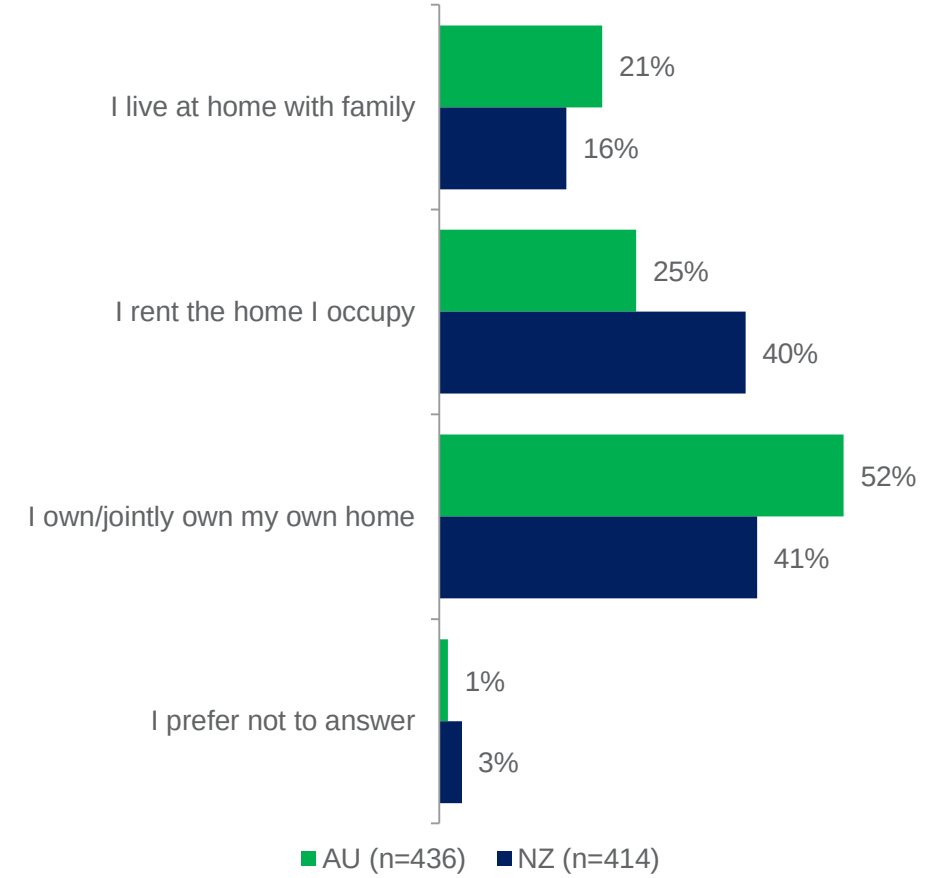
Sample demographics.

Household Income



D5. Roughly, what is your household income before tax?

Rent status

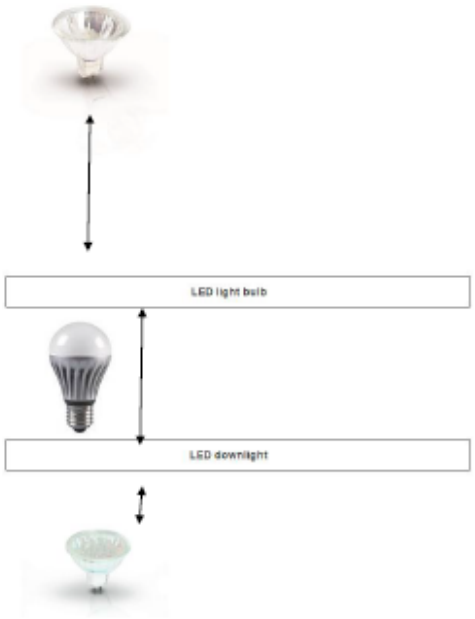


D4. Which of the following best describes your situation?

Base: All respondents

Questionnaire.

Screenshot – gaps between images



QUESTIONNAIRE

SURVEY INTRODUCTION

Hello and thanks for agreeing to do this survey! We appreciate your time and value your answers.

Just follow the prompts in the survey to answer the questions, and if you need to talk to anyone please don't hesitate to contact us.

Please click on "next" to enter the survey.

SCREENER

ASK ALL, MR
S1 EMPLOY
S1. Firstly, could you please indicate if you, or anyone you know well, are employed by…

1. An ad agency or are involved in advertising in anyway
2. A company involved in public relations or marketing
3. A company involved in banking & finance
4. A company that makes or sells lighting products
5. A company that makes or sells dairy products
6. A market research company
95. None of the above

IF 1, 2, 4 OR 6 IN S1, ABORT

ASK AU SAMPLE ONLY, OE-NUM (0-9999)
S2AU.POSTCODE
S2AU. Please enter your postcode in the space below

HIDDEN
dS2AU_CITY. LOCATION CLASSIFICATION

1. Sydney
2. NSW other than Sydney
3. Melbourne
4. Victoria other than Melbourne
5. Brisbane metropolitan area
6. Queensland other than Brisbane metropolitan area
7. Adelaide
8. South Australia other than Adelaide
9. Perth
10. Western Australia other than Perth
11. Darwin
12. Northern Territory other than Darwin
13. Hobart
14. Tasmania other than Hobart
15. Canberra
16. ACT outside Canberra

dS2AU_SPLITS. LOCATION:
1. Metro (Codes 1 OR 3 OR 5 OR 7 OR 9 OR 11 OR 13 OR 15)
2. Regional (Codes 2 OR 4 OR 6 OR 8 OR 10 OR 12 OR 14 OR 16)

CHECK QUOTAS
dS2AU_STATE

1. NSW (CODE 1 OR 2)
2. VIC (CODE 3 OR 4)
3. QLD (CODE 5 OR 6)
4. SA (CODE 7 OR 8)
5. WA (CODE 9 OR 10)
6. TAS (CODE 13 OR 14)
7. NT (CODE 11 OR 12)
8. ACT (CODE 15 OR 16)

ASK NZ SAMPLE ONLY, SR
S2NZ LOCATION
S2NZ In which one of the following areas do you live?

1. Auckland
2. Wellington
3. Other location on the North Island
4. Canterbury (including Christchurch)
5. Other location on the South Island

dS2NZ_SPLITS. Location:
1. Metro (NZ Codes 1,2,4)
2. Regional (NZ Codes 3,5)
CHECK QUOTAS

PROGRAMMING NOTE: IN FINAL DATA FILE PLEASE INCLUDE ONE VARIABLE MERGING AU AND NZ METRO/REGIONAL

CHECK QUOTAS

ASK ALL, SR
S3. Please indicate how you identify your gender.
Please select one of the options below.

1. Male
2. Female
3. Other

CHECK QUOTAS

ASK ALL, OE NUM RANGE 1-99
S4. How old are you?
Please type in your age.

[ ]

dS4. Recode responses at S4 here:
TERMINATE IF dS4=CODE 1

1. Under 15 years
2. 15-21 years
3. 22-25 years
4. 26-34 years
5. 35-44 years
6. 45-54 years
7. 55 – 65 years
8. 66+ years

CHECK QUOTAS

ASK ALL, SR
S5 ROLE
S5. Which of the following best describes your role in buying lighting products for your household?

1. I am the main buyer
2. I jointly share the buying with another household member
3. I seldom do any buying
4. I never buy any lighting products

IF 3 OR 4 IN S5, ABORT

ASK ALL, SR
S6 NONREJECTOR
S6. Which of the following best describes your attitude to purchasing energy efficient light bulbs? An energy efficient light bulb includes LEDs, Compact Fluorescent Lamps (CFLs), and linear Fluorescent tubes. They do not include halogen lamps.

1. I currently buy energy efficient light bulbs
2. I sometimes consider buying energy efficient light bulbs
3. I don't buy energy efficient light bulbs

IF SUCCESSFUL, CONTINUE

MAIN BODY OF QUESTIONNAIRE

ASK ALL, SR
Q1 IMPORTANT
Q1. How important is it to you that your light bulbs are energy efficient?

1. Extremely important
2. Very important
3. Quite important
4. Not very important
5. Not at all important

ASK ALL, SR
Q2 INFORMED
Q2. How well informed do you feel about the light bulb options available to you?

1. Extremely well informed
2. Very well informed
3. Quite well informed
4. Not very well informed
5. Not at all well informed

RANDOMISE ORDER THAT Q3-Q6 IS SHOWN
ASK ALL, OE
Q3 LUMENS
Q3. Please briefly describe what you understand by the term lumens, in relation to light bulbs.

[ ]

97. Don't know

ASK ALL, OE
Q4 WATTS
Q4. Please briefly describe what you understand by the term Watt, in relation to light bulbs.

[ ]

97. Don't know

ASK ALL, OE
Q5 COLOURTEMPERATURE
Q5. Please briefly describe what you understand by the term colour temperature, in relation to light bulbs.

[ ]

97. Don't know

ASK ALL, OE
Q6 LUMENSPERWATT
Q6. Please briefly describe what you understand by the term lumens per Watt, in relation to light bulbs.

[ ]

97. Don't know

ASK ALL, SR
Q8 PROCESS_EASE
Q8 How easy or difficult do you find the process of choosing a light bulb?
1. Extremely easy
2. Very easy
3. Quite easy
4. Neither easy nor difficult
5. Quite difficult
6. Very difficult
7. Extremely difficult

ASK ALL, SR
Q9 TIME
Q9.Generally speaking, how much time would you spend reviewing the options and choosing a light bulb?

1. Less than one minute
2. One to under two minutes
3. Two to under three minutes
4. Three to under five minutes
5. More than five minutes
99. Don't know

ASK ALL, SR
Q10 RESEARCH
Q10 Do you seek out information/conduct research on the type of light bulb you need before you leave home?
1. Yes – Always
2. Yes - Sometimes
3. No

ASK ALL, MR
Q11 DECISION
Q11 What information do you base your purchasing decision on?
1. Information on the packaging
2. Other printed/marketing material at the store
3. Assistance from staff
95. None of these SR

ASK ALL, MR, RANDOMISE BUT ANCHOR CODES 95 AND 96
Q12 IMPORTANT
Q12 Which of the following, if any, is important to you when choosing a light bulb?

1. Price
2. Brand
3. Energy efficiency
4. Design/style
5. Fitting
6. Lifetime
7. Watts
8. Lumens (brightness)
9. Colour temperature
10. Colour rendering (CRI)
95. None of these SR
96. Other, please specify

ASK AU SAMPLE ONLY, INSERT IMAGES NEXT TO EACH ANSWER CODE, MR
Q13AU WHATBUY
Q13. Which of the following types of light bulbs do you buy for use in your home?

8. Incandescent: candle/fancy round
7. Incandescent: decorative
6. CFL (Compact Florescent Light)
5. Halogen light bulb
4. Halogen downlight
3. LED light bulb
2. LED downlight
1. Linear fluorescent tube

ASK NZ SAMPLE ONLY, INSERT IMAGES NEXT TO EACH ANSWER CODE, MR
Q13NZ WHATBUY
Q13. Which of the following types of light bulbs do you buy for use in your home?

9. Traditional Incandescent GLS
8. Incandescent: candle/fancy round
7. Incandescent: decorative
6. CFL (Compact Florescent Light)
5. Halogen light bulb
4. Halogen downlight
3. LED light bulb
2. LED downlight
1. Linear fluorescent tube

ASK SEPERATELY FOR EACH CODE SELECTED AT Q13, SHOW UP TO THREE CODES FROM Q13 IN LOOP, IF MORE THAN THREE CHOOSE LEAST FILLED CODES, SR
Q14 WHYBUY
Q14. Why do you buy <textsub>?

1. It's what I've always bought for the specific light fitting
2. I've never thought to change the type of bulb
4. I've never considered buying another type of bulb
5. It the most cost effective light bulb option
6. It's the only option for my dimmable lights
7. It's the only option for the fitting I need i.e. bayonet, screw
8. It's the best quality light bulb available
9. It is the most efficient option
10. Cheapest option
96. Other, please specify

ASK SEPERATELY FOR UP TO THREE CODES SELECTED AT Q13, SR
Q15 REPLACE
Q15. Generally speaking, how often do you need to replace <textsub>?

1. At least once per month
2. Once every 2-3 months
3. Once every 3-6 months
4. Twice a year
5. Once a year
6. Every 2-3 years
7. Less often
99. Don't know

ASK SEPERATELY FOR UP TO THREE CODES SELECTED AT Q13, SR
Q16 VFM
Q16. How would you rate the value for money that you get from <textsub>?

1. Excellent
2. Very good
3. Good
4. Not very good
5. Not at all good

ASK SEPERATELY FOR UP TO THREE CODES SELECTED AT Q13, SR
Q17 PRICE
Q17 If the average price for <text sub> light bulb is <xx>, how likely or unlikely would you be to purchase this bulb?

1. Extremely likely
2. Very likely
3. Quite likely
4. Neither likely nor unlikely
5. Quite unlikely
6. Very unlikely
7. Extremely unlikely

ASK AU SAMPLE ONLY, SR
Q18AU CHOICE
Q18. The next time you replace one of the main light bulbs in your home, which one of the following would you choose? Please choose one of the options that best fits your experience.

8. Incandescent: candle/fancy round: $2
7. Incandescent: decorative: $7
6. CFL (Compact Florescent Light): $4
5. Halogen light bulb: $3
4. Halogen downlight: $4
3. LED light bulb: $10
2. LED downlight: $10
1. Linear fluorescent tube: $10

ASK NZ SAMPLE ONLY, SR
Q18NZ CHOICE
Q18. The next time you replace one of the main light bulbs in your home, which one of the following would you choose? Please choose one of the options that best fits your experience.

9. Traditional incandescent GLS: $1
8. Incandescent: candle/fancy round: $2
7. Incandescent: decorative: $7
6. CFL (Compact Florescent Light): $4
5. Halogen light bulb: $3
4. Halogen downlight: $4
3. LED light bulb: $10
2. LED downlight: $10
1. Linear fluorescent tube: $10

ASK ALL, SR
Q19 REPLACE
Q19 The next time you replace the <TEXT SUB FROM CHOICE AT Q18> in your home, which one of the following would have the greatest influence on your decision?

1. Quality
2. Familiarity
3. Recommendation by someone you trust
4. Price
5. Brand
6. Durability

ASK ALL, SR FOR Q20-Q33
Q20-Q33 INFORMATIONIMPORTANT<20-33>
Thinking about the information that might be printed on a light bulb pack; please indicate how important each of the following items of light bulb information is most important to you?

Q20. Light output emitted by the bulb
Q21. Energy used by the bulb (Wattage)
Q22. Energy efficiency (lumens per Watt)
Q23. Estimated annual energy cost
Q24. Expected lifespan of the light bulb
Q25. Colour temperature (warm/cool)
Q26. Colour Rendering Index (CRI)
Q27. Beam angle
Q28. Claimed incandescent equivalence e.g. equivalent to a 60W bulb
Q29. Whether the light bulb can be dimmed
Q30. Dimmer compatibility information
Q31. Transformer/converter compatibility information
Q32. Standby energy used by the bulb
Q33. Disposal information

1. Extremely important
2. Very important
3. Quite important
4. Neither important nor unimportant
5. Quite unimportant
6. Very unimportant
7. Extremely unimportant

ASK ALL, SR
Q34 EASE
Q34. How easy or difficult is it for you to find information on the energy efficiency of light bulbs?

1. Extremely easy
2. Very easy
3. Quite easy
4. Neither easy nor difficult
5. Quite difficult
6. Very difficult
7. Extremely difficult

ASK ALL, OE-NUM (1-5), RANDOMISE RANK
Q35 LABELRANK1
Q35. Below are 5 ideas that might be used on light bulb labels. We're interested in your views on the extent to which the labels achieve the key aim:

- Clearly communicates the **energy efficiency** of the light bulb

Thinking about the information above, please rank the labels from 1 to 5, where 1 = the label that most clearly communicates the aim and 5 is the label that least clearly communicates the aim. RANDOMISE.

1. Label A
2. Label B
3. Label C
4. Label D
5. Label E

ASK ALL, SR
Q36 IMPACT
Q36. Looking at this label <DISPLAY RANK 1>, if this was available on all light bulb packaging, to what extent would this influence your decision over which light bulb to purchase?

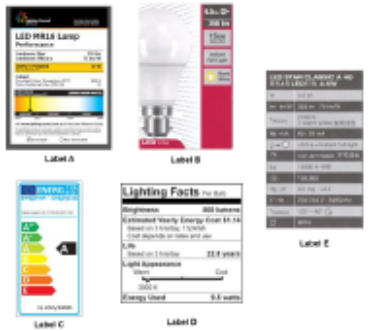
1. Definitely would
2. Probably would
3. Not sure
4. Probably would not
5. Definitely would not

ASK ALL, OE-NUM (1-5), RANDOMISE RANK
Q37 LABELRANK1
Q37. Below are 5 ideas that might be used on light bulb labels. We're interested in your views on the extent to which the labels achieve the key aim:

- Clearly communicates the **energy saving and cost saving** of the light bulb

Thinking about the information above, please rank the labels from 1 to 5, where 1 = the label that most clearly communicates the aim and 5 is the label that least clearly communicates the aim. RANDOMISE.

1. Label A
2. Label B
3. Label C
4. Label D
5. Label E



ASK ALL, SR
Q38 IMPACT
Q38. Looking at this label <DISPLAY RANK 1>, if this was available on all light bulb packaging, to what extent would this influence your decision over which light bulb to purchase?

1. Definitely would
2. Probably would
3. Not sure
4. Probably would not
5. Definitely would not

DEMOGRAPHICS

We require some personal details from you so that we can understand the views of specific groups of <Australians> <New Zealanders>. The answers you give will remain completely confidential.

ASK ALL, SR
D1 ENGLISH
D1. Do you speak a language, other than English at home?

1. Yes
2. No, English only
99. I prefer not to answer

ASK ALL, SR
D2 EDUCATION
D2. What is the highest level of education you have attained?

1. Year 8 or below
2. Year 9 or equivalent
3. Year 10 or equivalent
4. Year 11 or equivalent
5. Year 12 or equivalent
6. Still attending school
7. Trade certificate or apprenticeship
8. Diploma, certificate etc
9. Bachelor or Honours degree
10. Post-graduate qualifications (e.g., Masters, PhD)
96. Other – please specify
99. I prefer not to answer

ASK ALL AU, SR
D3AU HOUSEHOLDINCOME
D3AU. What is the total of all wages, salaries, Government benefits, pensions, allowances and other income that YOUR HOUSEHOLD usually receives before tax and superannuation deductions?

1. $1-$799 per week ($1-$41,599 per year)
2. $800-$1,599 per week ($41,600-$83,199 per year)
3. $1,600- $2,000 or more per week ($83,200-$104,000 or more per year)
4. No income
5. Negative income
99. I prefer not to answer

ASK ALL NZ, SR
D3NZ HOUSEHOLDINCOME
D3NZ. What is the total of all wages, salaries, Government benefits, pensions, allowances and other income that YOUR HOUSEHOLD usually receives before tax and superannuation deductions?

1. $1-$799 per week ($1-$41,599 per year)
2. $800-$1,599 per week ($41,600-$83,199 per year)
3. $1,600- $2,000 or more per week ($83,200-$104,000 or more per year)
4. No income
5. Negative income
99. I prefer not to answer

ASK ALL, SR
D4 RENT
D4. Which of the following best describes your situation?

1. I live at home with family
2. I rent the home I occupy
3. I own/jointly own my own home
99. Refuse to answer

CONCLUSION

Thank you, you have completed the survey.

As this is market research, it is carried out in compliance with the Privacy Act and the information you provided will be used only for research purposes. The research project is being conducted on behalf of the Department of Environment and Energy.

FINAL CLOSE/TERMINATION

Again, thank you for your patience in answering these questions. This research has been conducted by Your Source.

For questions about the Market Research Industry as a whole, you can call the Market and Social Research Society's Survey Line on 1300 364 830.

Thank you for your opinions.

Please click "SUBMIT" to send your responses to Your Source.