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**ARTCRAFT  
RESEARCH**



**COMMUNICATIONS  
MARKETING AND  
SOCIAL RESEARCH  
CONSULTANTS**

**Final Report**  
  
**on a**  
  
**Consumer Research Study**  
  
**about**  
  
**Compact Fluorescent Lamps (CFLs)**

**Prepared for the**



**by**

**Les Winton**

**9<sup>th</sup> May 2005**

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## Executive Summary:

Artcraft Research was commissioned by the Australia Greenhouse Office (AGO) within the Australian Department of the Environment and Heritage to conduct a research study, the overall objectives of which were to establish current knowledge, attitudes and behaviour regarding CFLs, and to gauge support for an endorsement label for better performing models.

The study involved a series of three focus group discussions, fifteen in-depth interviews and telephone interviews with a representative sample of 600 people 18yrs+ in Sydney and Melbourne during mid- to late April 2005.

This executive summary provides as overview of the main findings emerging from the study.

### Awareness of CFLs:

- Over one-half of the population mentions fluorescent and/or compact fluorescents unaided as globes that can be used in conventional light fittings in a home, with halogens (also) being mentioned by around one in five people.
- Once prompted, around three-quarters claim to be aware of compact fluorescents.

### Purchase of CFLs:

- Of the roughly three-quarters of people aware of CFLs, close to two-thirds claim to have purchased them at some stage. This means that close to half of the population has purchased CFLS.
- Around half of those who purchased CFLs last did so this year, with most of the rest having last purchased during 2004. In other words, purchasers' experience with CFLs is generally fairly recent.
- Most CFL purchasers last purchased them at a supermarket or other discount store. Hardware stores were the other main source of purchase.
- Close to half the CFL purchasers currently have at least four CFLs installed in their homes. Only around one in twelve purchasers do not currently have any CFLs installed in their homes..
- Subsequent questioning suggests that a few of these latter people have replaced blown CFLs with incandescent globes as they did not have a spare CFL handy at the time, although many others suggested that it was because they had actually rejected CFLs.

### Attitudes to CFLs:

- Only some four in ten CFL purchasers claim to be committed purchasers. In the focus groups many people suggested that there were limits as to how many of their light fittings would accept CFLs, and others suggested that they were likely only to install CFLs in heavily used lights (eg, in the main living areas), hence they still purchased a lot of incandescent globes. Many occasional purchasers suggested that they used CFLs only in specific situations (eg, external safety lights) as they did not like the lighting qualities of CFLs in living areas.
- On the other hand, around three-quarters of purchasers claim to be at least quite likely to recommend CFLs to a friend. However, the focus groups confirm that such recommendation is often conditional (hence also the proportion of purchasers in the survey who are only quite likely rather than very likely to recommend CFLs), for example,

recommending them as energy efficient and long-lasting, but at the same time criticising their lighting quality or purchase price..

- The key perceived positive features of CFLs are that they last longer than incandescent globes, use less electricity, have better lighting qualities and are more economical to run. Some one in eight could not offer any positive features of CFLs..
- The key perceived not-so-positive features of CFLs are that they are expensive to buy, have poor lighting qualities, are strange-looking and do not fit existing shades or sides of fittings. Close to four in ten people were unable to offer any not-so-positive features of CFLs..
- Some two-thirds of people expect that CFLs are a better proposition overall, whereas very few people expect that they are a worse proposition, with the balance wavering or unsure. Although those who have not purchased or not even heard (much) of CFLs are somewhat less convinced, it is still a majority of these people who expect that CFLs are a better proposition..

### **Perceptions about specific aspects of CFLs:**

- While the vast majority of people believe that CFLs last longer than incandescent globes, only around one-third of people believe that they last at least five times as long– packaging for most CFLs shows one CFL being equivalent to at least six incandescent bulbs. It would seem clear from the results to the survey and the focus groups that many people have had personal experience of at least one CFL lasting a shorter time than expected, and tend to judge the category accordingly. Others say they simply do not believe the claims made on the packaging.
- Most people believe that the globe life (eg, 8,000 hours) claimed on CFL packaging means that every globe will last very close to that figure. In the focus groups it became clear that this interpretation comes from the claim itself, with most packaging simply stating the number of hours (or in a few cases, number of years) without qualification. It does not mean that people believe it.
- On the other hand, we understand that the test used to support this claim indicates that this is the time at which half of the globes in a test batch have blown, that is, it is the median life of a test batch and does not indicate the range or variability of lifetimes of the globes in the test batch.
- Importantly, people find it very difficult to understand what a life of 8,000 hours means in ‘real time’ or whether this means having the light on constantly for 8,000 hours or being switched turned on and off frequently for a total of 8,000 hours over a much longer period. Hence, they tend either not to believe the longevity claim, or to discount it heavily.
- The vast majority of people believe that CFLs cost more than incandescent globes, although how much more varies widely. Indeed, around half believe that CFLs cost only about twice as much as incandescents or believe that they cost more but are uncertain as to how much more. From the focus groups, it would seem that many people judge CFLs in terms of the cheapest CFLs they have seen, against the price of the best and/or most expensive incandescent globes.
- Although most people generally think of CFLs using less electricity than incandescent globes, only a relatively small minority think that they use one-quarter or less electricity and only one in ten people think that they use one-fifth or less electricity. While CFL packaging typically says that they provide ‘up to 80% energy saving’ and shows that, say, an 8 watt CFL will give the same brightness as a 40 watt incandescent (both indicating that CFLs use about

one-fifth the electricity used by incandescents), most people simply do not understand or believe this level of efficiency..

### Attitudes to a proposed endorsement label:

- Some seventeen in twenty people say that they would be in favour of an endorsement label on the packaging of CFLs which meet a higher standard of performance than those meeting government minimum performance standards..
- A high nine in ten people say that they would at least possibly buy a label-endorsed CFL which is 'better made', even though it is likely to 'cost a bit more to buy'. However, a lesser two-thirds would at least probably do so, and only some one-quarter say that they would definitely do so. There is broadly the same level of support for label-endorsed CFLs among buyers and current non-buyers of CFLs..
- Close to four in ten people say that they would pay at least 10% more for an endorsed CFL over one not carrying the endorsement..

# 1. Introduction:

The main features of CFLs are that they use much less energy than incandescent globes for equivalent lighting output, last much longer, and are somewhat more expensive per unit cost. However, there is considerable anecdotal evidence of variability in the quality and performance of CFLs.

Also, the claim on packaging that a particular CFL will last 10,000 hours (for example) is potentially misleading to consumers, as it is based on the median life of a test batch (ie, half fail before the claimed lifespan and half last longer) – in poorer quality batches, many lamps may fail well short of the claimed lifespan.

All CFLs have to pass mandatory minimum safety and other standards, but the introduction of an endorsement label for models which substantially exceed minimum standards should enable consumers to make more informed choices.

There is some anecdotal evidence to suggest that many consumers have not yet tried CFLs or have abandoned further purchase of them because of these and other issues, but no definitive figures.

The AGO therefore commissioned Artcraft Research to conduct a research study which to provide representative findings on these and other issues in time for an upcoming conference.

The overall objectives of the study are:

- to establish current knowledge, attitudes and behaviour regarding CFLs, and
- to gauge support for an endorsement label for better performing models.

In addressing these objectives, the study covered the following question areas:

## Asked of whole sample:

- Awareness of CFLs
- Whether purchased CFLs
- Perceived positive features of CFLs
- Perceived not-so-good features of CFLs
- Perceptions of life of CFLs versus incandescent lights
- Perceptions of cost of CFLs versus incandescent lights
- Perceptions of amount of electricity used by CFLs versus incandescent lights
- Understanding of lifetime claims used on CFL packaging
- Support for an endorsement label for better performing CFLs

## Additional questions asked only of purchasers of CFLs:

- A measure of purchase commitment
- How recently last purchase was made
- Where purchased
- Number of CFLs currently in home
- Experiences with CFLs
- Likelihood of recommendation to friends

## **2. Methodology:**

As with other similar research programs, we feel that there is a need on this occasion to balance reasonably robust quantitative research with insightful and in-depth qualitative research.

While the quantitative research gives you baseline measurements that are representative of the population, and against which progress can be regularly monitored or ‘tracked’ if necessary, these are mainly numerical results to pre-structured questions (with a few open-ended questions perhaps shedding a bit more light but with only limited probing).

To complement this, the qualitative research component seeks to gain a more in-depth understanding of people’s views by enabling us to probe out (in ways not possible in structured quantitative interviews) the nature, range and scope of emotions, feelings and responses on various issues, and the kinds of language and vocabulary used by the community, and the extent to which they understand the language and vocabulary used by us. The qualitative research also provides an appropriate vehicle via which to pre-test and fine-tune communications and marketing ideas.

### **2.1 Qualitative Research Component:**

The qualitative research component of the study involved conducting a series of three focus group discussions and fifteen in-depth interviews, as follows:

- Group One: eight people aged 30 to 55 years, both gender, all of whom are recent purchasers of CFLs, living in Canberra;
- Group Two: eight people aged 18 to 39 years, both genders, five of whom had recently purchased CFLs and three of whom had not done so, living in Sydney.
- Group Three: nine people aged 40 to 60 years, both genders, six of whom had recently purchased CFLs and three of whom had not done so, living in Melbourne.
- In-depths: in pilot-testing the questionnaire for the quantitative survey, we conducted fifteen in-depth interviews with a cross-section of people in Sydney (8) and Melbourne (7), ten of whom had ever purchased CFLs and five of whom had never purchased them.

### **2.2 Quantitative Research Component:**

The quantitative survey involved administration of a structured questionnaire of average eight minutes duration by telephone to a stratified random sample of 600 people who are representative of the 18yrs+ populations of Sydney and Melbourne (see below for justification of sample size).

A structured questionnaire suitable for telephone administration was drawn up based on our briefing and the qualitative focus group discussions, and pilot-tested in a series of in-depth interviews with a small sub-sample (15) of the population to test for question flow and to eliminate any question wording ambiguities. The telephone interviews were then conducted during mid-April 2005 by our experienced team of IQCA-accredited telephone interviewers, who were briefed and supervised on the study.

In terms of the sample design, a reliable electronic telephone book was used, which contains an up-to-date listing of all listed residential (and business) telephone numbers in Australia from which a sample covering Sydney and Melbourne was drawn. This program has an inbuilt facility to enable reliable random sampling of the population to be undertaken, stratified by city.

Regarding sample size, whenever a survey is based on a sample of the population, the results can vary from those that would have been obtained had everyone been included in the survey, as indicated in the table below. A sample size of 600 was selected for the quantitative survey as it limits sampling tolerances to around  $\pm 4\%$  at the 95% confidence level. The representative sub-sample of 283 people who have ever purchased compact fluorescent lamps is subject to sampling tolerances to around  $\pm 6\%$  at the 95% confidence level. These tolerances are deemed acceptable for surveys of this nature.

## 2.3 A Note on Sample Size and Sampling Tolerances:

To explain this a little further, whenever a random sample is drawn to be representative of a given population, sampling tolerances ('s') can be calculated using the formula

$$s = \pm 2 \times \sqrt{p\{100-p\}/n}$$

where 'p' is the level of response (eg, 68%), and 'n' is the sample or sub-sample size upon which it is based. The following table provides sampling tolerances that can be applied in interpreting the results of surveys of this nature:

<b>Sampling Tolerances for Sample Surveys</b>					
Size of Sample or Sub-Sample	Sampling tolerance (plus or minus) for various response levels at the 95% confidence level – 'infinite' universe, where the proportion answering one way (eg, "yes") approaches:				
n	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
100	$\pm 5.9\%$	$\pm 7.8\%$	$\pm 9.0\%$	$\pm 9.6\%$	$\pm 9.8\%$
125	$\pm 5.3\%$	$\pm 7.0\%$	$\pm 8.0\%$	$\pm 8.6\%$	$\pm 8.8\%$
150	$\pm 4.8\%$	$\pm 6.4\%$	$\pm 7.3\%$	$\pm 7.8\%$	$\pm 8.0\%$
175	$\pm 4.4\%$	$\pm 5.9\%$	$\pm 6.8\%$	$\pm 7.3\%$	$\pm 7.4\%$
200	$\pm 4.2\%$	$\pm 5.5\%$	$\pm 6.4\%$	$\pm 6.8\%$	$\pm 6.9\%$
250	$\pm 3.7\%$	$\pm 4.9\%$	$\pm 5.7\%$	$\pm 6.1\%$	$\pm 6.2\%$
300	$\pm 3.4\%$	$\pm 4.5\%$	$\pm 5.2\%$	$\pm 5.5\%$	$\pm 5.7\%$
325	$\pm 3.3\%$	$\pm 4.4\%$	$\pm 5.0\%$	$\pm 5.3\%$	$\pm 5.5\%$
400	$\pm 2.9\%$	$\pm 3.9\%$	$\pm 4.5\%$	$\pm 4.8\%$	$\pm 4.9\%$
450	$\pm 2.8\%$	$\pm 3.7\%$	$\pm 4.2\%$	$\pm 4.5\%$	$\pm 4.6\%$
500	$\pm 2.6\%$	$\pm 3.5\%$	$\pm 4.0\%$	$\pm 4.3\%$	$\pm 4.4\%$
600	$\pm 2.4\%$	$\pm 3.2\%$	$\pm 3.7\%$	$\pm 3.9\%$	$\pm 4.0\%$
700	$\pm 2.2\%$	$\pm 3.0\%$	$\pm 3.4\%$	$\pm 3.6\%$	$\pm 3.7\%$
800	$\pm 2.1\%$	$\pm 2.8\%$	$\pm 3.2\%$	$\pm 3.4\%$	$\pm 3.5\%$
900	$\pm 2.0\%$	$\pm 2.6\%$	$\pm 3.0\%$	$\pm 3.2\%$	$\pm 3.3\%$
1,000	$\pm 1.9\%$	$\pm 2.5\%$	$\pm 2.8\%$	$\pm 3.0\%$	$\pm 3.1\%$
1,200	$\pm 1.7\%$	$\pm 2.3\%$	$\pm 2.6\%$	$\pm 2.8\%$	$\pm 2.8\%$
1,500	$\pm 1.5\%$	$\pm 2.0\%$	$\pm 2.3\%$	$\pm 2.5\%$	$\pm 2.5\%$

### 3. Summary of the Main Research Findings:

This section of the report provides a summary of the main findings emerging from the study. For a more detailed analysis by population sub-groups, please refer to Section 4.

#### 3.1 Awareness of CFLs:

##### 3.1.1 Unaided and prompted awareness:

- Over one-half of the population (54.3%) mentions fluorescent and/or compact fluorescents unaided as globes that can be used in conventional light fittings in a home, with halogens (also) being mentioned by around one in five people (21.7%). (See Figure 1).
- Once prompted, around three-quarters (73.3%) claim to be aware of compact fluorescents. (See Figure 2).

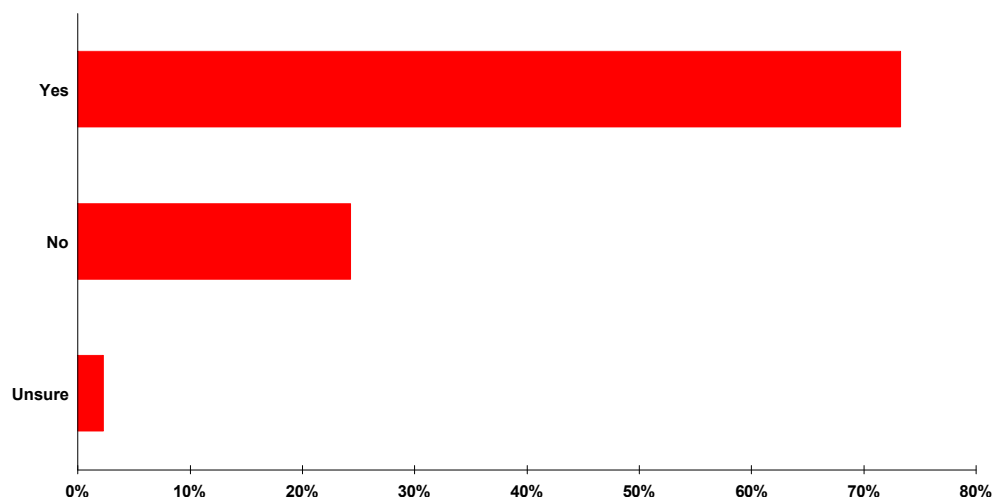
**Figure 1: Q. Apart from ordinary incandescent globes, what other kinds of globes is it possible to use in conventional light fittings in a home? (DO NOT READ OUT PRECODES)**

<i>All respondents: Base = 600 Multiples accepted</i>	All %
Fluorescents*	40.3
Compact fluorescents*	38.7
Halogen	21.7
Other	11.7
Unsure	18.3
*Net fluorescent/compact fluorescent (ie, % mentioning either or both)	54.3

**Figure 2a: Q. Compact fluorescent lights can be used to replace standard incandescent lamps or bulbs in conventional light fittings in the home. They come in both bayonet and screw types. Have you ever heard of them?**

<i>All respondents: Base = 600</i>	All %
Yes	73.3
No	24.3
Unsure	2.3

**Figure 2b: Whether aware when prompted of CFLs**



## 3.2 Purchase of CFLs:

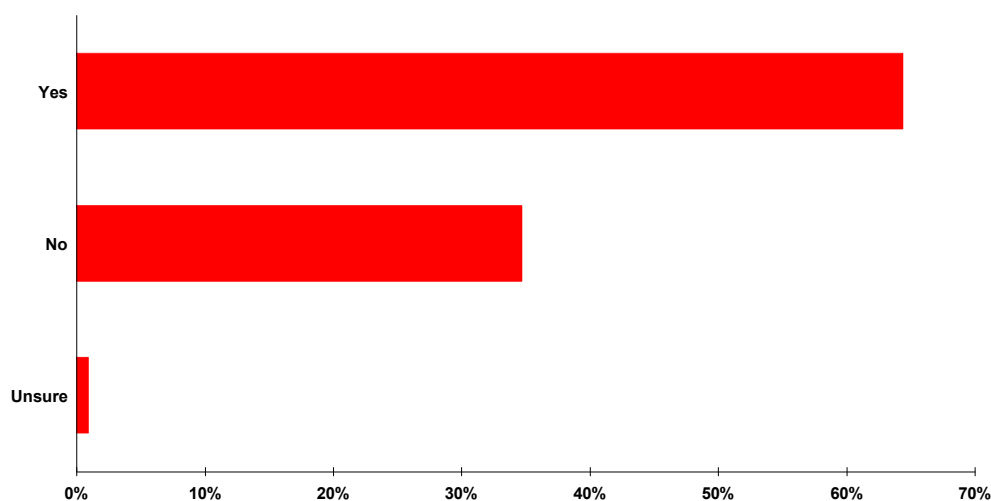
### 3.2.1 Whether purchased:

- Of the roughly three-quarters of people aware of CFLs (73.3%), close to two-thirds (64.4%) claim to have purchased them at some stage. This means that close to half of the population has purchased them (64.4% of 73.3% = 47.2%). (See Figure 3).

Figure 3a: Q. And have you ever purchased any compact fluorescent lights for use in your home?

<i>Among those who have heard of CFLs</i> <i>Base = 440</i>	All %
Yes	64.4
No	34.7
Unsure	0.9

Figure 3b: Whether ever purchased CFLs (among those aware of them)



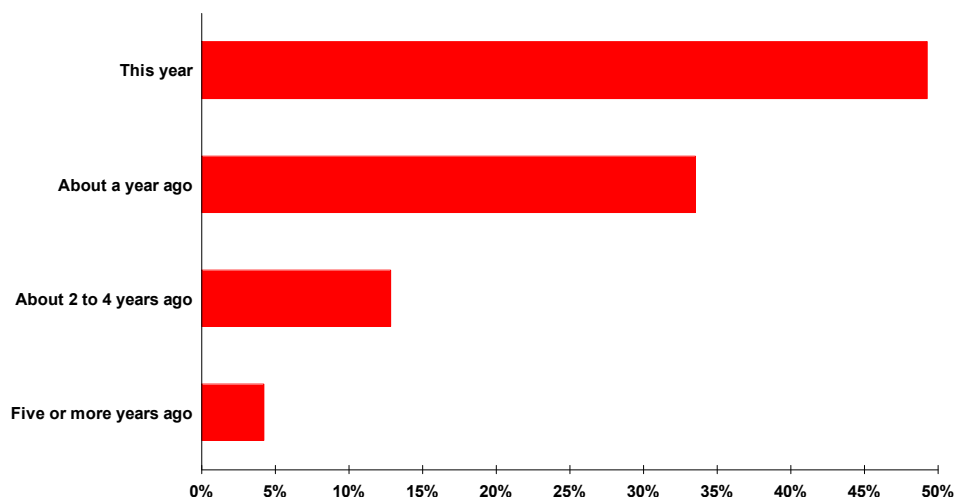
### 3.2.2 How recently last purchased:

- Around half of those who purchased CFLs last did so this year, with most of the rest having last purchased during 2004. In other words, purchasers' experience with CFLs is generally fairly recent. (See Figure 4).

Figure 4a: Q. How recently did you last purchase any compact fluorescent lights?

<i>Among those who have purchased CFLs</i> <i>Base = 283</i>	All %
This year	49.3
About a year ago	33.6
About 2 to 4 years ago	12.9
Five or more years ago	4.3

Figure 4b: How recently purchased CFLs



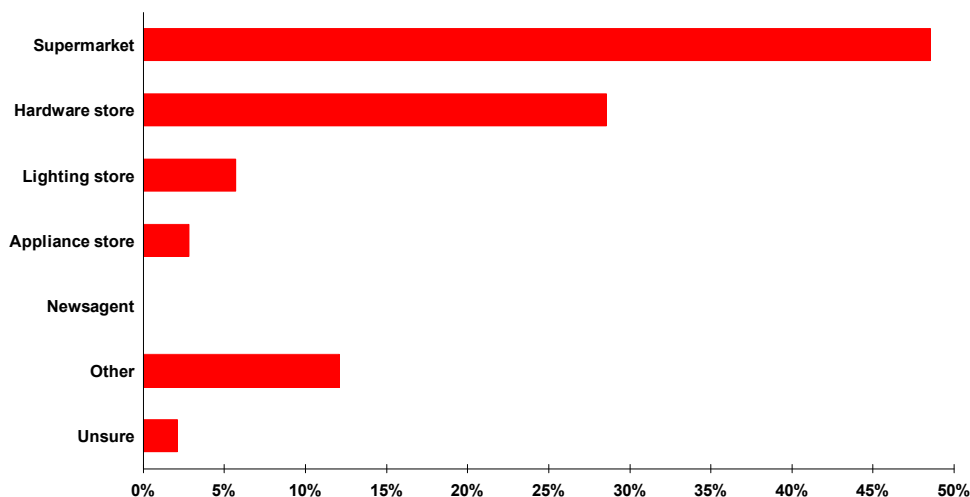
### 3.2.3 Where last purchased:

- Most CFL purchasers last purchased them at a supermarket (48.6%) or other discount store (roughly 10%). Hardware stores were the other main source of purchase (28.6%). (See Figure 5).

Figure 5a: Q. From what type of outlet did you last purchase any compact fluorescent lights?

<i>Among those who have purchased CFLs</i>	
<i>Base = 283</i>	
	All %
Supermarket	48.6
Hardware store	28.6
Lighting store	5.7
Appliance store	2.9
Newsagent	0.0
Other (eg, mainly discount stores)	12.1
Unsure	2.1

Figure 5b: Where last purchased CFLs



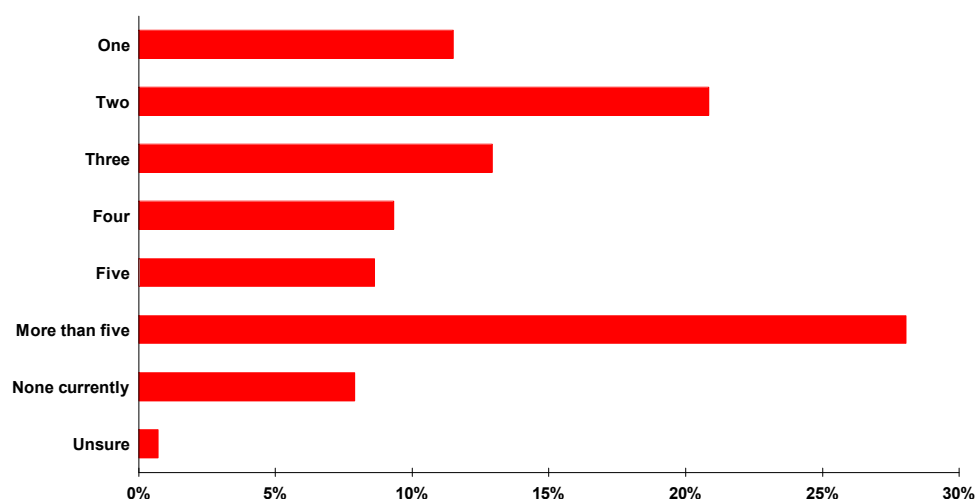
### 3.2.4 Number of CFLs installed in home:

- Close to half the CFL purchasers currently have at least four CFLs installed in their homes. Only around one in twelve (7.9%) purchasers do not currently have any CFLs installed in their homes. (See Figure 6).
- Subsequent questioning suggests that a few of these latter people have replaced blown CFLs with incandescent globes as they did not have a spare CFL handy at the time, although many others suggested that it was because they had actually rejected CFLs.

**Figure 6a: Q. And how many compact fluorescent lights would you currently have installed at home?**

<i>Among those who have purchased CFLs</i> <i>Base = 283</i>	All %
One	11.5
Two	20.9
Three	12.9
Four	9.4
Five	8.6
More than five	28.1
None currently	7.9
Unsure	0.7
Four or more installed	46.1

**Figure 6b: Number of CFLs currently installed in home**



## 3.3 Attitudes to CFLs:

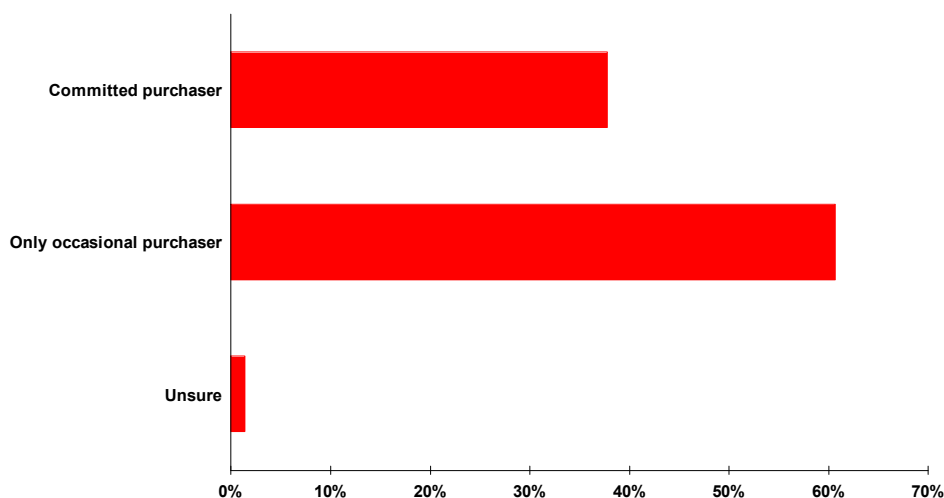
### 3.3.1 Committed Purchasers?

- Only some four in ten CFL purchasers claim to be committed purchasers (37.9%). In the focus groups many people suggested that there were limits as to how many of their light fittings would accept CFLs, and others suggested that they were likely only to install CFLs in heavily used lights (eg, in the main living areas), hence they still purchased a lot of incandescent globes. Many occasional purchasers suggested that they used CFLs only in specific situations (eg, external safety lights) as they did not like the lighting qualities of CFLs in living areas. (See Figure 7).

**Figure 7a: Q. Would you say you are a committed purchaser of compact fluorescent lights, or only an occasional purchaser?**

<i>Among those who have purchased CFLs</i> <i>Base = 283</i>	All %
Committed purchaser	37.9
Only occasional purchaser	60.7
Unsure	1.4

Figure 7b: Committed purchaser?



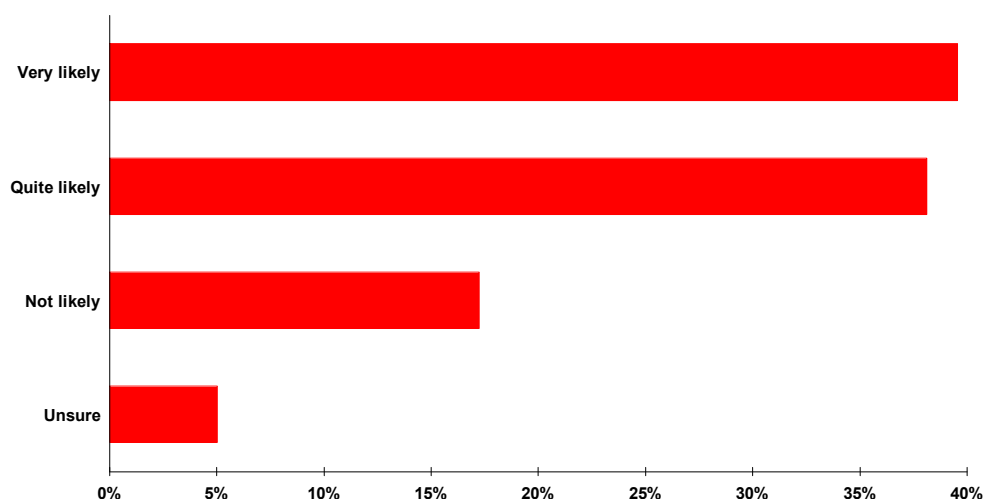
### 3.3.2 Whether would recommend to friends?

- On the other hand, around three-quarters of purchasers claim to be at least quite likely to recommend CFLs to a friend. However, the focus groups confirm that such recommendation is often conditional (hence also the proportion of purchasers in the survey who are only quite likely rather than very likely to recommend CFLs), for example, recommending them as energy efficient and long-lasting, but at the same time criticising their lighting quality or purchase price. (See Figure 8).

Figure 8a: Q. How likely is it that you would recommend compact fluorescent lights to a friend... very likely, quite likely or not likely?

<i>Among those who have purchased CFLs</i> <i>Base = 283</i>	All %
Very likely	39.6
Quite likely	38.1
Not likely	17.3
Unsure	5.0
Total very+quite likely	77.7

Figure 8b: Whether would recommend CFLs to a friend



### 3.3.3 Positive and not-so-positive features of CFLs:

- The key perceived positive features of CFLs are that they last longer than incandescent globes (43.3%), use less electricity (38.3%), have better lighting qualities (31.7%) and are more economical to run (20.7%). Some one in eight (12.3%) could not offer any positive features of CFLs. (See Figure 9).
- The key perceived main not-so-positive features of CFLs are that they are expensive to buy (20.0%), have poor lighting qualities (18.0%), are strange-looking (14.7%) and do not fit existing shades or sides of fittings (10.7%). Close to four in ten people (37.0%) were unable to offer any not-so-positive features of CFLs. (See Figure 10).

Figure 9: Q. (Even though you may not have much knowledge or experience of compact fluorescent lights, I'd still like you to answer the following questions based on your expectations, firstly...). What do you expect might be the good features of compact fluorescent lights? ... What are their benefits?

<i>All respondents: Base = 600 Accept Multiples</i>	All %
Last longer/ don't blow as often	43.3
Use less electricity/ energy efficient	38.3
Better lighting qualities/nicer glow/ brighter/whiter	31.7
More economical to run/cost less to run	20.7
More economical to buy overall/ cost more but last longer	8.7
Don't have to be changed as often/ convenience	7.0
Good for the environment	2.7
Easy to fit/replace	0.3
Other (eg, mainly cooler/not as hot)	4.0
None/Unsure	12.3

**Figure 10 Q. And what if anything are their not-so-good points?... What challenges or issues do they have?**

<i>All respondents: Base = 600 Accept Multiples</i>	All %
Cost too much per se/expensive to buy/too much money at a time	20.0
Poor lighting qualities/not white enough/too white/harsh light	18.0
Ugly/strange-looking/look unfinished	14.7
Do not fit within existing shades or sides of fittings	10.7
Lose brightness over time/ go dull after a while/lose wattage	3.3
Fragile/break easily when replacing/can't hold properly to fit	1.7
Some last much less time than others/variable life/unpredictable life	1.3
Not economical to buy/not worth the extra money/not value	1.0
Unsafe/can explode/contain dangerous substances/mercury	0.7
Other (eg, mainly unable to use with dimmers or poor power supply)	13.7
None/Unsure	37.0

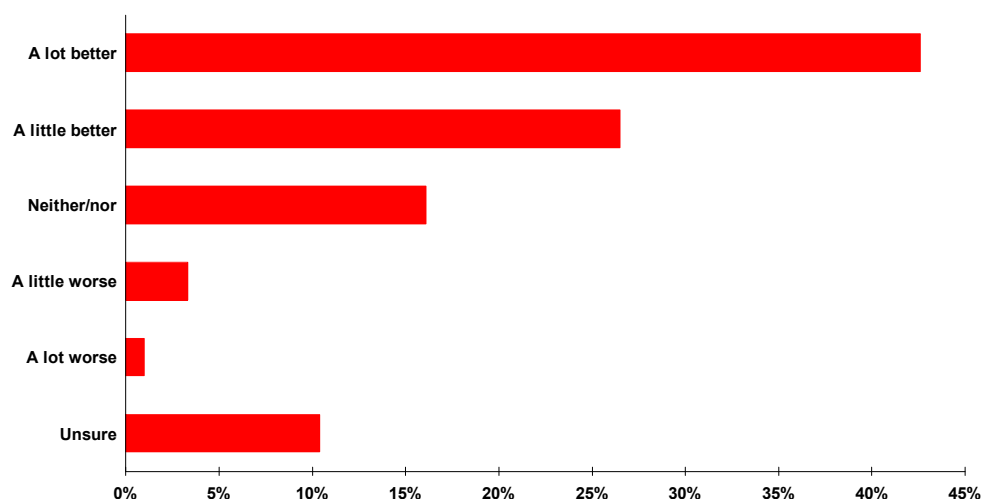
### 3.3.4 Are CFLs a good proposition:

- Some two-thirds of people (66.6%) expect that CFLs are a better proposition overall, whereas very few people expect that they are a worse proposition (4.3%), with the balance wavering or unsure. Although those who have not purchased or not even heard (much) of CFLs are somewhat less convinced, it is still a majority of these people who expect that CFLs are a better proposition. (See Figure 11).

**Figure 11a: Q. Overall, taking everything into account, do you expect that compact fluorescent lights are a better or a worse proposition than ordinary incandescent lights? PROBE: would that be a lot better/worse proposition or only a little better/worse?**

<i>All respondents: Base = 600</i>	All %
A lot better	42.3
A little better	26.3
Neither/nor	16.0
A little worse	3.3
A lot worse	1.0
Unsure	10.3
<b>Total a lot+little better than incandescents</b>	<b>66.6</b>
<b>Total a lot+little worse than incandescents</b>	<b>4.3</b>

**Figure 11b: Are CFLs a better or worse proposition than incandescents**



## 3.4 Perceptions about specific aspects of CFLs:

### 3.4.1 Perceived longevity of CFLs:

- While the vast majority of people believe that CFLs last longer than incandescent globes (86.0%), only around one-third of people believe that they last at least five times as long (35.2%) – packaging for most CFLs shows one CFL being equivalent to at least six incandescent bulbs. It would seem clear from the results to the survey and the focus groups that many people have had personal experience of at least one CFL lasting a shorter time than expected, and tend to judge the category accordingly. Others say they simply do not believe the claims made on the packaging. (See Figure 12. Also, Figure 19 shows how ‘globe life’ is typically depicted).
- Most people (63.3%) believe that the globe life (eg, 8,000 hours) claimed on CFL packaging means that every globe will last very close to that figure. In the focus groups it became clear that this interpretation comes from the claim itself, with most packaging simply stating the number of hours (or in a few cases, number of years) without qualification. It does not mean that people believe it. (See Figure 19).
- On the other hand, we understand that the test used to support this claim indicates that this is the time at which half of the globes in a test batch have blown, that is, it is the median life of a test batch and does not indicate the range or variability of lifetimes of the globes in the test batch.
- Importantly, people find it very difficult to understand what a life of 8,000 hours means in ‘real time’ or whether this means having the light on constantly for 8,000 hours or being switched turned on and off frequently for a total of 8,000 hours over a much longer period. Hence, they tend either not to believe the longevity claim, or to discount it heavily.

**Figure 12a: Q. Compared to ordinary incandescent lights, how long would you expect compact fluorescent lights to last...do you expect that they would last a shorter time than ordinary incandescent lights, about the same amount of time, or would they last longer? IF LONGER, PROBE: Would they last twice as long, 5 times, 10 times, 15 times, or 20 or more times as long?**

<i>All respondents: Base = 600</i>	All %
Last 20 or more times as long	1.0
Last 15 times as long	2.7
Last 10 times as long	11.4
Last 5 times as long	20.1
Last twice as long	33.1
Last more time but unsure how long	17.7
Last about the same time	4.7
Last less time	0.7
Unsure	8.7
Last <u>at least</u> 5 times as long as incandescents	35.2
Last longer than incandescents	86.0

**Figure 12b: How long CFLs last compared to incandescents**

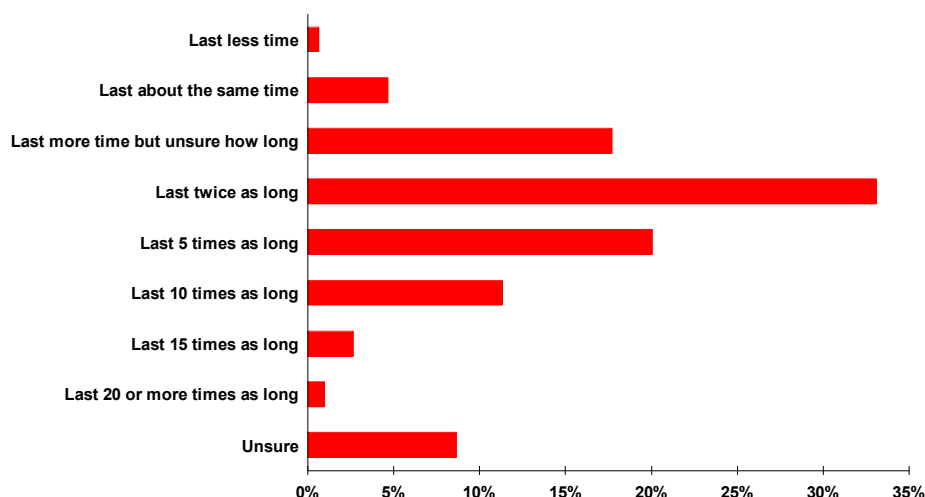
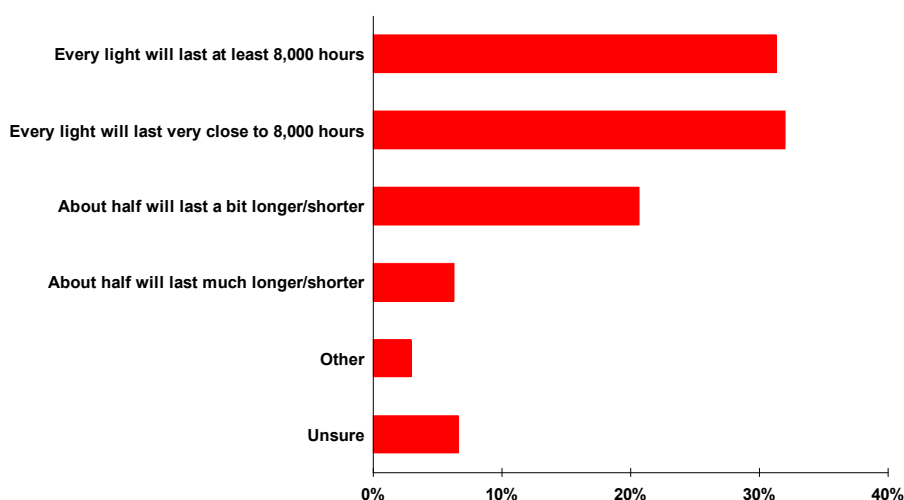


Figure 13a: Q. Depending on the brand and size, the packaging sometimes says they last around, 6,000, 8,000 or 10,000 hours, or they might say they last 3, 4 or 5 years. If the packaging for a light says it lasts 8,000 hours, which of the following statements best describes what you think this means...[READ OUT PRECODES]

All respondents: Base = 600	All %
Every light you buy of that type will last at least 8,000 hours	31.3
Every light you buy of that type will last very close to 8,000 hours	32.0
About half the lights will last a bit longer and about half will last a bit shorter time than 8,000 hours	20.7
About half the lights will last much longer and about half will last a much shorter time than 8,000 hours	6.3
Other (eg, mainly that every light will last less than 8,000 hours)	3.0
Unsure	6.7
Total: will last very close to 8,000 hours, or longer	63.3

Figure 13b: What the lifetime claim on CFL packaging is thought to mean



### 3.4.2 Perceived purchase cost of CFLs:

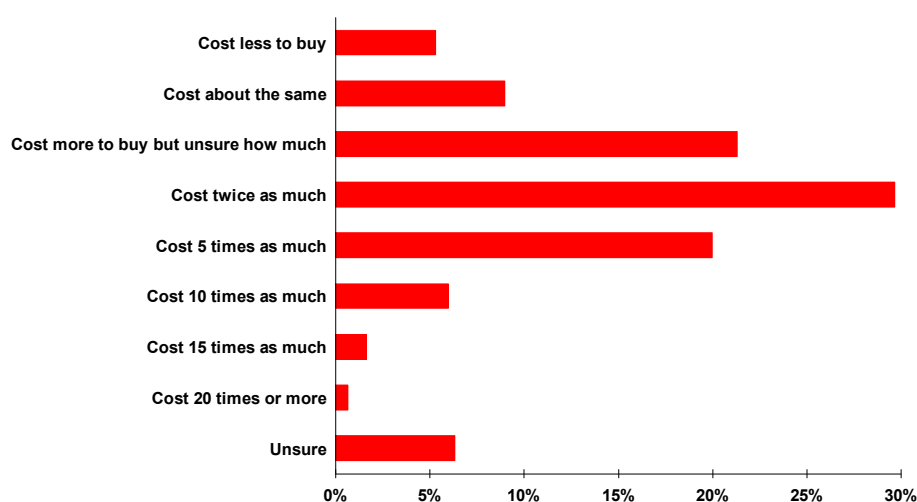
- The vast majority of people (79.4%) believe that CFLs cost more than incandescent globes, although how much more varies widely. Indeed, around half believe that CFLs cost only about twice as much as incandescents or believe that they cost more but are uncertain as to how much more. From the focus groups, it would seem that many people judge CFLs in

terms of the cheapest CFLs they have seen, against the price of the best and/or most expensive incandescent globes.

**Figure 14a: Q. Do you expect compact fluorescent lights to cost less, about the same or more to buy than ordinary incandescent lights.? IF COST MORE, PROBE: Would they cost twice as much, 5 times, 10 times, 15 times, or 20 or more times as much to buy?**

<i>All respondents: Base = 600</i>	All %
Cost 20 times or more	0.7
Cost 15 times as much	1.7
Cost 10 times as much	6.0
Cost 5 times as much	20.0
Cost twice as much	29.7
Cost more to buy but unsure how much	21.3
Cost about the same	9.0
Cost less to buy	5.3
Unsure	6.3
Total: cost only twice as much + unsure how much more	51.0
Total: cost more to buy	79.4

**Figure 14b: How much CFLs cost compared to incandescents**



### 3.4.3 Perceived energy use of CFLs:

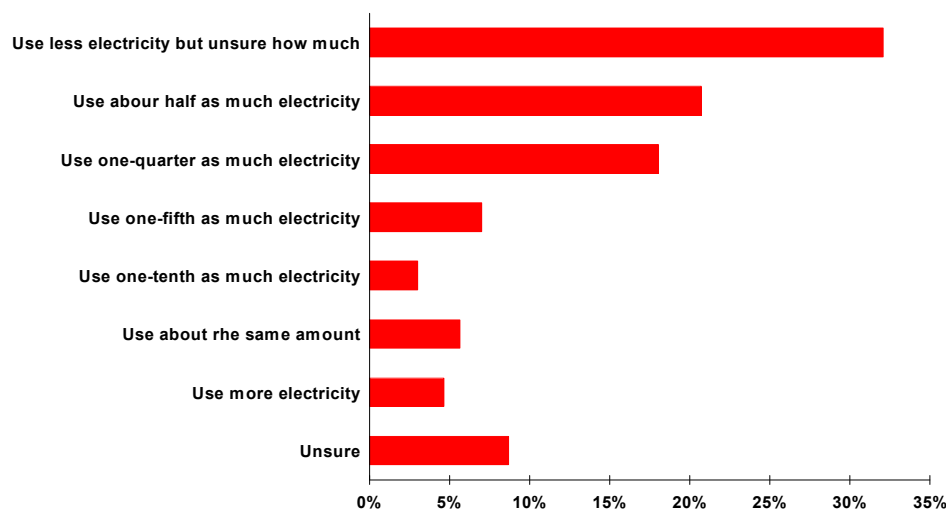
- Although most people (80.9%) generally think of CFLs using less electricity than incandescent globes, only a relatively small minority think that they use one-quarter or less electricity (28.1%) and only one in ten people (10.0%) think that they use one-fifth or less electricity. While CFL packaging typically says that they provide ‘up to 80% energy saving’ and shows that, say, an 8 watt CFL will give the same brightness as a 40 watt incandescent (both indicating that CFLs use about one-fifth the electricity used by incandescents), most people simply do not understand or believe this level of efficiency. (See Figure 15).

**Figure 15a: Q. Do you expect that compact fluorescent lights would use less, same or more electricity than ordinary incandescent lights? IF USE LESS, PROBE: Would you say they use would use about half, one-quarter, one-fifth or one-tenth the amount of electricity as incandescent lights?**

<i>All respondents: Base = 600</i>	All %
Use one-tenth as much electricity	3.0
Use one-fifth as much electricity	7.0
Use one-quarter as much electricity	18.1

Use about half as much electricity	20.7
Use less electricity but unsure how much	32.1
Use about the same amount	5.7
Use more electricity	4.7
Unsure	8.7
Total: use one-quarter as much electricity or less	28.1
Total: use less electricity	80.9

Figure 15b: How much electricity CFLs use compared to incandescents



## 3.5 Attitudes to a proposed endorsement label:

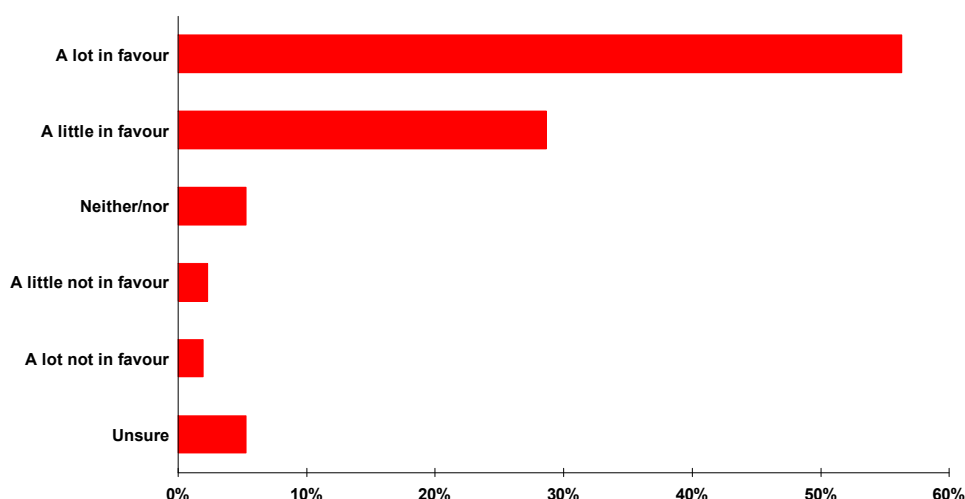
### 3.5.1 In favour of endorsement label, or not?

- Some seventeen in twenty people (85.0%) say that they would be in favour of an endorsement label on the packaging of CFLs which meet a higher standard of performance than those meeting government minimum performance standards. (See Figure 16).

Figure 16a: Q. Only those compact fluorescent lights that meet government minimum performance standards are allowed to be sold in Australia, but some perform far better than others. Would you be in favour or not in favour of an endorsement label being added to the packaging of compact fluorescent lights which meet a higher standard of performance?  
PROBE: very much or a little?

All respondents: Base = 600	All %
A lot in favour	56.3
A little in favour	28.7
Neither/nor	5.3
A little not in favour	2.3
A lot not in favour	2.0
Unsure	5.3
Total a lot+little in favour	85.0
Total a lot+little not in favour	4.3

Figure 16b: Support for an endorsement label for higher performing CFLs



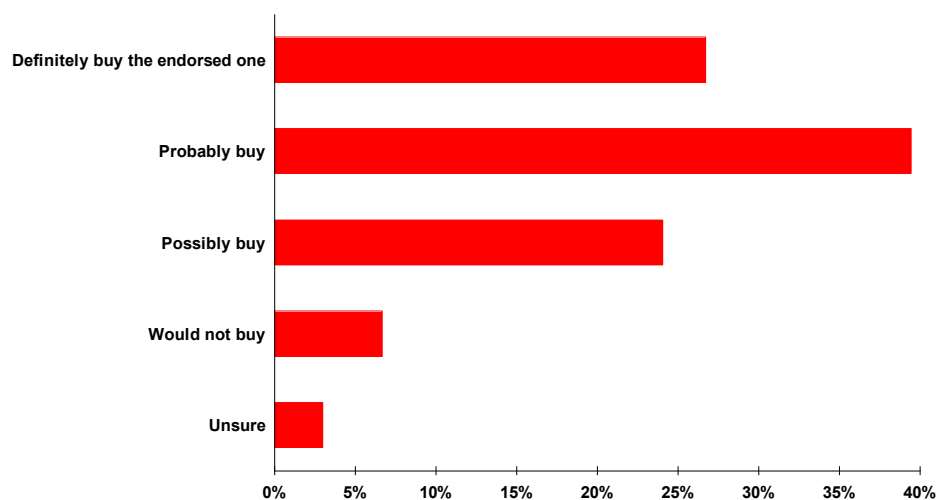
### 3.5.2 Whether would buy a label-endorsed product:

- A high nine in ten people (90.0%) say that they would at least possibly buy a label-endorsed CFL which is 'better made', even though it is likely to 'cost a bit more to buy'. However, a lesser two-thirds (66.0%) would at least probably do so, and only some one-quarter (26.7%) say that they would definitely do so. There is broadly the same level of support for label-endorsed CFLs among buyers and current non-buyers of CFLs. (See Figure 17).

**Figure 17a: Q. As CFL lights carrying the endorsement label are likely to be better made, they are likely to cost a bit more to buy. If the extra cost was reasonable, how likely is it that you would buy the endorsed ones: would you definitely, probably or possibly buy, or wouldn't you buy the endorsed one?**

<i>All respondents: Base = 600</i>	All %
Definitely buy the endorsed one	26.7
Probably buy	39.3
Possibly buy	24.0
Would not buy	6.7
Unsure	3.0
Total definitely+probably buy	66.0
Total definitely+probably+possibly buy	90.0

**Figure 17b: Whether would buy label-endorsed CFLs**



### 3.5.3 Price sensitivity for label-endorsed CFL:

- Close to four in ten people (36.7%) say that they would pay at least 10% more for an endorsed CFL over one not carrying the endorsement. (See Figure 18).

**Figure 18a: Q. How much extra would you be prepared to pay for an endorsed compact fluorescent light over one not carrying the endorsement... up to 10% more, 10 to 25% more, 25 to 50% more, 50 to 100% more or more than double the cost?**

<i>Among those who would buy endorsed ones</i> Base = 542	All %
More than double	1.9
50 to 100% more	1.9
25 to 50% more	8.5
10 to 25% more	24.4
Up to 10% more	55.6
Unsure	7.8
<b>Total would pay at least 10% more</b>	<b>36.7</b>

**Figure 18b: How much extra prepared to pay for label-endorsed CFLs**

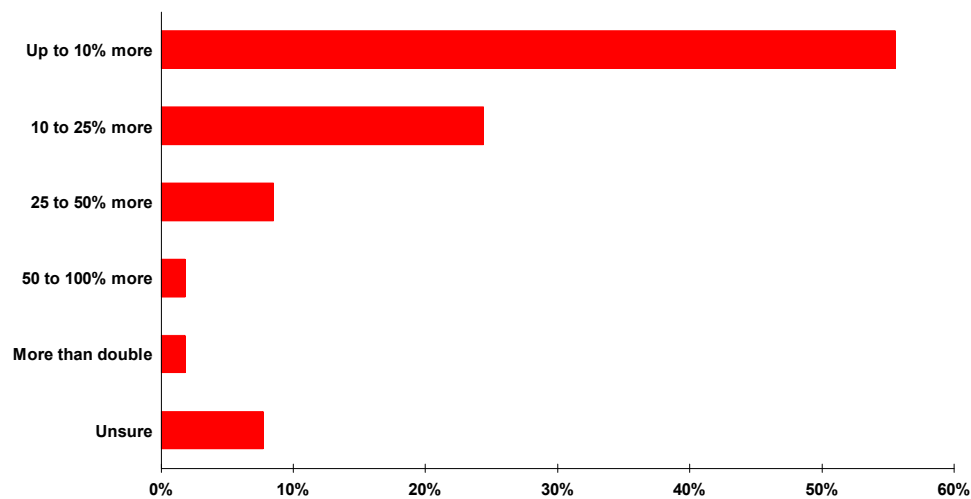


Figure 19: Photographs of CFLs and typical packaging



230-240V 50Hz  
15W 0.13A  
V99319/EEU-15  
Bayonet Cap  
**15 WATT**

## SLIMLINE

Energy Saving Lamp  
**TWIN PACK**

**QUICK START - NON FLICKERING  
UP TO 80% ENERGY SAVING**

POWER CONSUMPTION	GLOBE LIFE	BRIGHTNESS
20% 100%		10 = 50 W 15 = 75 W 18 = 90 W

Suggested for nearest equivalent consumption and light output  
CAUTION: This globe is not to be used in conjunction with dimmer switches or any other electronic devices.

**PLEASE AVOID CLASPING GLASS TUBING WHEN HANDLING LAMP**  
Coles Reliance. Great quality at a great price. Not completely satisfied?  
Return product to store for a replacement or full refund.  
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**BC 15 WATT**

MADE IN CHINA

240V  
BC  
BAYONET CAP  
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APPROVAL No.  
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**10,000+ HOURS**

## MINI Spiral

ENERGY EFFICIENT LAMP  
**10,000 HOURS**

UNIQUE SPIRAL DESIGN FOR GREATER ILLUMINATION  
QUICK START - NON FLICKERING  
UP TO 80% ENERGY SAVING

POWER CONSUMPTION	GLOBE LIFE	BRIGHTNESS
20% 100%		5 = 25 W 8 = 40 W

Suggested for nearest equivalent consumption and light output  
CAUTION: This globe is not to be used in conjunction with dimmer switches or any other electronic devices.

**BC 8 WATT**

MIRABELLA INTERNATIONAL PTY. LTD.  
MADE IN CHINA

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## 4. Detailed Tabular Findings:

**Table 1: Q. Apart from ordinary incandescent globes, what other kinds of globes is it possible to use in conventional light fittings in a home?**

<i>All respondents: Base = 600 Multiples accepted</i>	All %	Heard and bought %	Heard but not bought %	Not heard of %	City	
					Sydney %	Melbourne %
Fluorescents	40.3	38.3	43.2	43.8	41.7	39.8
Compact fluorescents	38.7	64.5	29.6	2.5	28.2	44.4
Halogen	21.7	18.4	23.5	26.3	18.4	23.0
Other	11.7	10.6	11.1	13.8	13.6	10.7
Unsure	18.3	9.9	19.8	30.0	30.1	12.2
	All %	Gender		Age		
		Male %	Female %	18 to 39 years %	Over 39 years %	
Fluorescents	40.3	45.4	37.5	42.6	38.7	
Compact fluorescents	38.7	42.9	35.8	27.8	45.0	
Halogen	21.7	23.5	20.5	22.2	20.9	
Other	11.7	9.2	11.9	12.0	11.5	
Unsure	18.3	16.8	19.9	20.4	17.3	

**Table 2: Q. Compact fluorescent lights can be used to replace standard incandescent lamps or bulbs in conventional light fittings in the home. They come in both bayonet and screw types. Have you ever heard of them?**

<i>All respondents:</i> <i>Base = 600</i>	All %	City			
		Sydney %	Melbourne %		
Yes	73.3	68.0	76.0		
No	24.3	28.2	22.4		
Unsure	2.4	3.8	1.6		
	All %	Gender		Age	
		Male %	Female %	18 to 39 years %	Over 39 years %
Yes	73.3	80.7	68.2	66.7	77.0
No	24.3	16.0	30.1	29.6	21.5
Unsure	2.4	3.3	1.7	3.7	1.5

**Table 3: Q. And have you ever purchased any compact fluorescent lights for use in your home?**

<i>Among those who have heard of CFLs</i> Base = 440	All %	City			
		Sydney %	Melbourne %		
Yes	64.4	65.2	63.8		
No	34.7	34.8	34.9		
Unsure	0.9	0.0	1.3		
	All %	Gender		Age	
		Male %	Female %	18 to 39 years %	Over 39 years %
Yes	64.4	67.4	61.7	54.2	69.9
No	34.7	32.6	36.7	43.1	30.1
Unsure	0.9	0.0	1.7	2.8	0.0

**Table 4: Q. Would you say you are a committed purchaser of compact fluorescent lights, or only an occasional purchaser?**

<i>Among those who have purchased CFLs</i> Base = 283	All %	Heard and bought %	Heard but not bought %	Not heard of %	City	
					Sydney %	Melbourne %
Committed purchaser	37.9	37.9	0.0	0.0	28.9	42.6
Only occasional purchaser	60.7	60.7	0.0	0.0	68.9	56.4
Unsure	1.4	1.4	0.0	0.0	2.2	1.1
	All %	Gender		Age		
		Male %	Female %	18 to 39 years %	Over 39 years %	
Committed purchaser	37.9	36.5	39.2	43.6	35.6	
Only occasional purchaser	60.7	61.9	59.5	56.4	62.4	
Unsure	1.4	1.6	1.4	0.0	2.0	

**Table 5: Q. How recently did you last purchase any compact fluorescent lights?**

<i>Among those who have purchased CFLs</i> Base = 283	All %	City		Age	
		Sydney %	Melbourne %	18 to 39 years %	Over 39 years %
This year	49.3	44.4	52.1		
About a year ago	33.6	42.2	29.8		
About 2 to 4 years ago	12.9	6.7	16.0		
Five or more years ago	4.3	6.7	2.1		
		Gender		Age	
	All %	Male %	Female %	18 to 39 years %	Over 39 years %
This year	49.3	49.2	48.6	48.7	49.5
About a year ago	33.6	30.2	36.5	35.9	32.7
About 2 to 4 years ago	12.9	14.3	12.2	12.8	12.9
Five or more years ago	4.3	6.3	2.7	2.6	5.0

**Table 6: Q. From what type of outlet did you last purchase any compact fluorescent lights?**

<i>Among those who have purchased CFLs Base = 283</i>	All %	City			
		Sydney %	Melbourne %		
Supermarket	48.6	53.3	46.8		
Hardware store	28.6	17.8	34.0		
Lighting store	5.7	8.9	4.3		
Appliance store	2.9	4.4	2.1		
Newsagent	0.0	0.0	0.0		
Other	12.1	15.6	9.6		
Unsure	2.1	0.0	3.2		
	All %	Gender		Age	
		Male %	Female %	18 to 39 years %	Over 39 years %
Supermarket	48.6	46.0	51.4	51.3	47.5
Hardware store	28.6	31.7	25.7	33.3	26.7
Lighting store	5.7	1.6	9.5	5.1	5.9
Appliance store	2.9	3.2	2.7	5.1	2.0
Newsagent	0.0	0.0	0.0	0.0	0.0
Other	12.1	14.3	9.5	2.6	15.8
Unsure	2.1	3.2	1.4	2.6	2.0

**Table 7: Q. In general, what have been your experience with compact fluorescent lights... how have you found them in terms of reliability, performance, and so on?**

A wide range of responses emerged here, with the following being a representative cross-section to provide flavour without too much repetition – the prevalence of these kinds of views can be seen in tables 10 and 11.

Re: longevity/value:

- Better than usual / last longer.
- Don't know yet, waiting to see – so far it has out-lived 2 normal globes.
- Excellent, long lasting.,
- Excellent, they have lasted for a very long time, which is why we bought them in the first place.
- Excellent/ last a long time.
- Fantastic/ last a long time/ compared to normal globes 3-4 times longer.
- Fine – last a long time, save a lot of money that way.
- First started using them in 1991 and have only had one that's been a dud and the manufacturer replaced it free of charge.
- I've had one since 1993 that is still going strong – I'm very satisfied with them as they do save energy.
- Lasting wise/ lifespan / last longer than conventional globes/ twice as long.
- Long lasting and stay cooler.
- We find them very good as they last longer than regular bulbs. It's also cheaper to buy fluoro as they last longer than cheap bulbs. I'd prefer to spend money and get quality fluoro bulbs that last longer than regular bulbs.

But:

- Better brands like Osram last longer, but 'No Frills' brand doesn't last 2 days.
- Don't last as long as advertised but last a long time.
- Don't last as long as stated on packaging.
- No better than an incandescent light, lasts no longer, about one year is all.
- Not real good, didn't last long enough.
- Quality not always the same – some just don't last the distance.
- Quite a few at them have broken down fairly quickly, some in just two months.
- They only last the same time as normal globes, but you do save on electricity.
- They work well, but don't seem to last any longer than normal globes, so we will not replace them if they continue not to last.

Re: lighting quality:

- Better light, last longer.
- Better lighting white colour makes the room easier to see and is easier on my eyes/ not a harsh light like normal light bulbs.
- Good for machine sewing/ lights up area well/ better light than ordinary room light.
- I have found the compact fluoro globes to be very good, the white light is better for my eyes than regular globes.

But:

- All right – seems harder on the eyes but don't blow as often
- Brighter sometimes, duller at other times – seems to vary depending on how many appliances we have on.
- Didn't use it for long – wasn't bright enough, wrong wattage, only used it for about a month.
- Disappointing – doesn't throw out enough light
- Generally good, but no good for security lighting as not bright enough – same wattage but doesn't throw the light as far..
- In a normal room the CFL 60 watt doesn't give 60 watt illumination, so we transferred them to reading lamps and they are perfect as a reading lamp globe.
- It was a good idea, but we had to take them out because they didn't fit in our textures properly – they were too glary and flicker a lot – so we had to put regular light bulbs in.
- Light not as bright, and too white.
- Light quality not good/ its duller.
- Like to use them but have problems finding brighter light ones.
- Never bright enough for anything – dimmer than normal 60 watt globe compared to the same wattage as CFLs.
- Not bright enough even though I bought the brightest one available.
- Not illuminating enough don't shed enough light.
- Not satisfactory, they don't give a good light, the colour range is missing.
- One purchase was not the right wattage and wasn't bright enough – live in a big old house with 11 foot high ceilings. Have not bought any more.
- Output not good – it definitely doesn't give the output it claims.
- Performance was disappointing, the 15 watt is supposed to give you 60 watt light and it doesn't.
- They are not equivalent to a 100 watt bulb, not as bright as they claim to be.
- They are not very bright compared to a 60 watt bulb.
- They were ugly/ didn't give me sufficient light compared to normal light.
- When they heat up more they send out more light. Depends on how high or low the current is at that time of day.

Re: starting-up time:

- Quick to brighten up and stay bright – reliable performance.

But:

- Don't have to be changed as often but they hum every time when first turned on.
- Reliability good, but the fact it's not instant light is annoying – I've timed it and it takes around three minutes to gain full brightness.

- *Sometimes they are a bit slow to start up, but once they are going they last for a very long time.*
- *They take a little time to warm up – a couple of minutes before you receive full brightness.*

Re: convenience:

- *Fine, good to use in hard to reach places.*
- *Can be used in places not easy to get to and they last a long time.*
- *Good – bright lighting and lasts a long time, have noticed that electricity bill has been cheaper since installing CFLs*
- *Good – long lasting, convenience of not having to change globes so often*
- *I like the shorter ones, more practical, fit into more fittings and don't hang down below shade, although they aren't as bright as the longer ones.*
- *They are not so clumsy, designed better compared to previous models years ago that used to be heavy for the lamps.*

But:

- *Good except you can't use them on dimmer lights, you can only turn them off or on.*
- *Had to get smaller (shorter) ones to fit in light fittings – never style home. They should make the brighter ones shorter as well.*
- *It was OK, but it didn't fit into my existing fitting so I couldn't use it.*
- *Only issue can be finding right fitting or lamp that will take them.*

**Table 8: Q. How likely is it that you would recommend compact fluorescent lights to a friend... very likely, quite likely or not likely?**

<i>Among those who have purchased CFLs</i> Base = 283	All %	City			
		Sydney %	Melbourne %		
Very likely	39.6	26.7	46.2		
Quite likely	38.1	40.0	36.6		
Not likely	17.3	24.4	14.0		
Unsure	5.0	8.9	3.2		
	All %	Gender		Age	
		Male %	Female %	18 to 39 years %	Over 39 years %
Very likely	39.6	39.7	38.4	38.5	40.0
Quite likely	38.1	38.1	38.4	48.7	34.0
Not likely	17.3	15.9	19.2	7.7	21.0
Unsure	5.0	6.3	4.1	5.1	5.0

**Table 9: Q. And how many compact fluorescent lights would you currently have installed at home?**

<i>Among those who have purchased CFLs</i> Base = 283	All %	City			
		Sydney %	Melbourne %		
One	11.5	13.3	10.8		
Two	20.9	20.0	20.4		
Three	12.9	13.3	12.9		
Four	9.4	6.7	10.8		
Five	8.6	11.1	7.5		
More than five	28.1	22.2	31.2		
None currently	7.9	13.3	5.4		
Unsure	0.7	0.0	1.1		
	All %	Gender		Age	
		Male %	Female %	18 to 39 years %	Over 39 years %
One	11.5	19.0	5.5	12.8	11.0
Two	20.9	22.2	20.5	15.4	23.0
Three	12.9	11.1	13.7	20.5	10.0
Four	9.4	7.9	11.0	2.6	12.0
Five	8.6	6.3	9.6	7.7	9.0
More than five	28.1	28.6	27.4	35.9	25.0
None currently	7.9	4.8	11.0	5.1	9.0
Unsure	0.7	0.0	1.4	0.0	1.0

**Table 10: Q. (Even though you may not have much knowledge or experience of compact fluorescent lights, I'd still like you to answer the following questions based on your expectations, firstly...). What do you expect might be the good features of compact fluorescent lights? ... What are their benefits?**

<i>All respondents:</i> <i>Base = 600</i> <i>Accept Multiples</i>	All %				City	
		Heard and bought %	Heard but not bought %	Not heard of %	Sydney %	Melbourne %
Last longer/ don't blow as often	43.3	51.1	40.7	32.5	39.8	45.4
Use less electricity/ energy efficient	38.3	44.0	34.6	32.5	22.3	46.9
Better lighting qualities/nicer glow/ brighter/whiter	31.7	34.8	23.5	35.0	27.2	34.2
More economical to run/cost less to run	20.7	22.0	23.5	15.0	18.4	21.4
More economical to buy overall/ cost more but last longer	8.7	9.2	7.4	8.8	9.7	8.2
Don't have to be changed as often/ convenience	7.0	7.8	4.9	7.5	4.9	7.7
Good for the environment	2.7	3.5	3.7	0.0	1.0	3.6
Easy to fit/replace	0.3	0.7	0.0	0.0	1.0	0.0
Other	4.0	5.7	1.2	3.8	5.8	3.1
Unsure	12.3	4.3	19.8	18.8	20.4	8.2
		Gender		Age		
	All %	Male %	Female %	18 to 39 years %	Over 39 years %	
Last longer/ don't blow as often	43.3	41.2	44.9	44.4	42.9	
Use less electricity/ energy efficient	38.3	41.2	37.5	39.8	37.7	
Better lighting qualities/nicer glow/ brighter/whiter	31.7	26.1	36.4	34.3	30.4	
More economical to run/cost less to run	20.7	27.7	14.2	21.3	19.9	
More economical to buy overall/ cost more but last longer	8.7	8.4	9.1	11.1	7.3	
Don't have to be changed as often/ convenience	7.0	7.6	6.8	11.1	4.7	
Good for the environment	2.7	2.5	2.8	2.8	2.6	
Easy to fit/replace	0.3	0.0	0.6	0.0	0.5	
Other	4.0	3.4	4.5	2.8	4.7	
Unsure	12.3	12.6	12.5	7.4	15.2	

**Table 11 Q. And what if anything are their not-so-good points?... What challenges or issues do they have?**

<i>All respondents:</i> <i>Base = 600</i> <i>Accept Multiples</i>	All %				City	
		Heard and bought %	Heard but not bought %	Not heard of %	Sydney %	Melbourne %
Cost too much per se/expensive to buy/too much money at a time	20.0	14.2	28.4	22.5	9.7	25.5
Poor lighting qualities/not white enough/too white/harsh light	18.0	14.9	14.8	25.0	9.7	22.4
Ugly/strange-looking/look unfinished	14.7	14.2	19.8	10.0	9.7	16.8
Do not fit within existing shades or sides of fittings	10.7	14.2	11.1	5.0	6.8	12.8
Lose brightness over time/ go dull after a while/lose wattage	3.3	2.8	4.9	2.5	1.9	4.1
Fragile/break easily when replacing/can't hold properly to fit	1.7	1.4	3.7	0.0	1.0	2.0
Some last much less time than others/variable life/unpredictable life	1.3	2.1	1.2	0.0	0.0	2.0
Not economical to buy/not worth the extra money/not value	1.0	0.0	2.5	1.3	0.0	1.5
Unsafe/can explode/contain dangerous substances/mercury	0.7	0.0	2.5	1.3	0.0	1.0
Other	13.7	21.3	4.9	10.0	16.5	12.2
Unsure	37.0	33.3	37.0	42.5	54.4	28.1
		Gender		Age		
	All %	Male %	Female %	18 to 39 years %	Over 39 years %	
Cost too much per se/expensive to buy/too much money at a time	20.0	17.6	21.6	25.0	17.3	
Poor lighting qualities/not white enough/too white/harsh light	18.0	18.5	18.2	23.1	15.2	
Ugly/strange-looking/look unfinished	14.7	13.4	15.3	18.5	12.6	
Do not fit within existing shades or sides of fittings	10.7	10.1	11.4	6.5	13.1	
Lose brightness over time/ go dull after a while/lose wattage	3.3	5.9	1.7	6.5	1.6	
Fragile/break easily when replacing/can't hold properly to fit	1.7	3.4	0.6	1.9	1.6	
Some last much less time than others/variable life/unpredictable life	1.3	0.8	1.7	0.9	1.6	
Not economical to buy/not worth the extra money/not value	1.0	1.7	0.6	2.8	0.0	
Unsafe/can explode/contain dangerous substances/mercury	0.7	0.8	0.6	0.9	0.5	
Other	13.7	17.6	10.2	13.0	13.6	
Unsure	37.0	34.5	39.2	30.6	40.8	

**Table 12: Q. Compared to ordinary incandescent lights, how long would you expect compact fluorescent lights to last...do you expect that they would last a shorter time than ordinary incandescent lights, about the same amount of time, or would they last longer? IF LONGER, PROBE: Would they last twice as long, 5 times, 10 times, 15 times, or 20 or more times as long?**

<i>All respondents: Base = 600</i>	All %	Heard and bought %	Heard but not bought %	Not heard of %	City	
					Sydney %	Melbourne %
Last less time	0.7	0.0	2.5	0.0	0.0	1.0
Last about the same time	4.7	3.5	5.0	6.3	4.9	4.6
Last more time but unsure how long	17.7	13.5	23.8	22.5	16.7	18.4
Last twice as long	33.1	39.7	22.5	30.0	35.3	32.1
Last 5 times as long	20.1	24.1	16.3	16.3	19.6	20.4
Last 10 times as long	11.4	12.8	12.5	7.5	11.8	10.7
Last 15 times as long	2.7	2.1	1.3	5.0	1.0	3.6
Last 20 or more times as long	1.0	0.7	2.5	0.0	0.0	1.5
Unsure	8.7	3.5	13.8	12.5	10.8	7.7
		Gender		Age		
	All %	Male %	Female %	18 to 39 years %	Over 39 years %	
Last less time	0.7	0.8	0.6	0.9	0.5	
Last about the same time	4.7	4.2	5.1	5.6	4.2	
Last more time but unsure how long	17.7	18.5	17.0	16.7	18.3	
Last twice as long	33.0	26.1	36.9	35.2	31.9	
Last 5 times as long	20.0	22.7	18.8	19.4	20.4	
Last 10 times as long	11.3	14.3	9.1	13.9	9.9	
Last 15 times as long	2.7	2.5	2.8	3.7	2.1	
Last 20 or more times as long	1.0	2.5	0.0	0.0	1.6	
Unsure	8.7	8.4	9.1	3.7	11.0	

**Table 13: Q. Do you expect compact fluorescent lights to cost less, about the same or more to buy than ordinary incandescent lights.? IF COST MORE, PROBE: Would they cost twice as much, 5 times, 10 times, 15 times, or 20 or more times as much to buy?**

<i>All respondents: Base = 600</i>	All %				City	
		Heard and bought %	Heard but not bought %	Not heard of %	Sydney %	Melbourne %
Cost less to buy	5.3	3.5	2.5	11.3	8.7	3.6
Cost about the same	9.0	5.7	9.9	13.8	12.6	7.1
Cost more to buy but unsure how much	21.3	20.6	24.7	22.5	14.6	24.5
Cost twice as much	29.7	31.2	29.6	25.0	35.9	26.5
Cost 5 times as much	20.0	26.2	13.6	15.0	14.6	23.0
Cost 10 times as much	6.0	6.4	7.4	3.8	2.9	7.7
Cost 15 times as much	1.7	2.8	1.2	0.0	0.0	2.6
Cost 20 times or more	0.7	0.7	1.2	0.0	1.0	0.5
Unsure	6.3	2.8	9.9	8.8	9.7	4.6
		Gender		Age		
	All %	Male %	Female %	18 to 39 years %	Over 39 years %	
Cost less to buy	5.3	6.7	4.5	6.5	4.7	
Cost about the same	9.0	8.4	9.7	11.1	7.9	
Cost more to buy but unsure how much	21.3	21.0	21.6	22.2	20.9	
Cost twice as much	29.7	22.7	35.2	25.9	31.9	
Cost 5 times as much	20.0	18.5	19.9	19.4	20.4	
Cost 10 times as much	6.0	10.1	3.4	8.3	4.7	
Cost 15 times as much	1.7	2.5	1.1	2.8	1.0	
Cost 20 times or more	0.7	0.8	0.6	0.0	1.0	
Unsure	6.3	9.2	4.0	3.7	7.3	

**Table 14: Q. Do you expect that compact fluorescent lights would use less, same or more electricity than ordinary incandescent lights? IF USE LESS, PROBE: Would you say they use would use about half, one-quarter, one-fifth or one-tenth the amount of electricity as incandescent lights?**

<i>All respondents: Base = 600</i>	All %	Heard and bought %	Heard but not bought %	Not heard of %	City	
					Sydney %	Melbourne %
Use less electricity but unsure how much	32.1	35.0	33.3	27.5	31.1	32.3
Use about half as much electricity	20.7	18.6	21.0	23.8	20.4	21.0
Use one-quarter as much electricity	18.1	19.3	17.3	15.0	16.5	19.0
Use one-fifth as much electricity	7.0	7.1	7.4	6.3	5.8	7.7
Use one-tenth as much electricity	3.0	3.6	0.0	5.0	0.0	4.6
Use about rhe same amount	5.7	5.7	3.7	7.5	8.7	4.1
Use more electricity	4.7	2.9	6.2	6.3	5.8	4.1
Unsure	8.7	7.9	11.1	8.8	11.7	7.2
	All %	Gender		Age		
		Male %	Female %	18 to 39 years %	Over 39 years %	
Use less electricity but unsure how much	32.0	35.3	29.5	24.1	36.6	
Use about half as much electricity	20.7	24.4	18.2	24.1	18.8	
Use one-quarter as much electricity	18.0	16.8	19.3	22.2	15.7	
Use one-fifth as much electricity	7.0	5.0	8.0	5.6	7.9	
Use one-tenth as much electricity	3.0	3.4	2.8	4.6	2.1	
Use about rhe same amount	5.7	1.7	8.0	6.5	5.2	
Use more electricity	4.7	5.0	4.5	7.4	3.1	
Unsure	8.7	8.4	9.1	5.6	9.9	

**Table 15: Q. Overall, taking everything into account, do you expect that compact fluorescent lights are a better or a worse proposition than ordinary incandescent lights? PROBE: would that be a lot better/worse proposition or only a little better/worse?**

<i>All respondents: Base = 600</i>	All %				City	
		Heard and bought %	Heard but not bought %	Not heard of %	Sydney %	Melbourne %
A lot better	42.3	51.1	36.3	31.6	50.5	38.3
A little better	26.3	24.1	27.5	29.1	20.8	29.6
Neither/nor	16.0	17.0	15.0	17.7	9.9	19.4
A little worse	3.3	0.7	6.3	5.1	4.0	3.1
A lot worse	1.0	2.1	0.0	0.0	1.0	1.0
Unsure	10.3	5.0	15.0	16.5	13.9	8.7
	All %	Gender		Age		
		Male %	Female %	18 to 39 years %	Over 39 years %	
A lot better*	42.3	42.0	42.0	37.0	45.5	
A little better*	26.3	23.5	28.4	29.6	24.6	
Neither/nor	16.0	21.0	13.1	19.4	14.1	
A little worse**	3.3	2.5	4.0	5.6	2.1	
A lot worse**	1.0	2.5	0.0	0.0	1.6	
Unsure	10.3	7.6	11.9	6.5	12.0	

\* + \*\* See reasons on next page.

**Table 16: Q. Why do you say that?... why do you feel that compact fluorescent lights are a better/worse proposition than incandescent lights?... Any other reasons? [PROBE FULLY]**

\* Examples of reasons for thinking that CFLs are a **better** proposition than incandescent globes:

- Because it's compact.
- Because they last longer and are cheaper to run.
- Believe they would be more economical.
- Better for environment, use less electricity.
- Better for environment and cheaper to run.
- Better for the environment and saves money in the long run.
- Better light, uses less electricity.
- Better quality light and technology.
- Better technology/ more efficient and easily available self change no need to electrician.
- Better value, last longer, brighter light.
- Bills would be less and CFLs last longer.
- Bright.
- Brighter, clearer light than ordinary.
- Brighter, last longer
- CFL globes last longer
- Cheaper to run – you can leave running all night at a fairly low cost.
- Cheaper to run / use less electricity and last longer
- Cheaper to run and better lighting
- Cheaper to run and last longer.
- Cheaper to run, brighter light in areas needed. Last longer
- Cheaper to run, last longer, use less electricity.
- Cheaper to run, use less electricity.
- Cheaper to run, won't explode, use less electricity.
- Cost efficient. Less energy.
- Cost less in long run.
- Cost more than incandescent globes so assume they are better/ last longer than incandescent globes.
- Cost more to purchase but more energy efficient.
- Cost savings/ less power/ environmentally friendly.
- Cost wise over the long run they are better.
- Different colour now, last longer, soft texture.
- Different sort of light, long lasting.
- Do last longer, bit better light and brighter.
- Don't have to buy as often, cost less in and when taking into account original cost and amount of electricity, they use.
- Don't have to change as often, convenience. Light better – cleaner to see.
- Don't have to change so often, cheaper to run, light not so harsh.
- Don't have to change them as frequently as normal lights.
- Don't have to replace them as often. Cost effective.
- Don't need to change them as often as normal globes.
- Easier to work under, give a whiter, clearer and brighter light.
- Economic, cheaper to run, last longer.
- Economical, can leave on all day and not much expense.
- Economics.
- Economy and soft light.
- Electricity saving/ last longer.
- Electricity savings/ last longer save money.
- Energy efficient, better for environment.
- Energy efficient, environmentally friendly and cheaper in long run.
- Energy efficient/ cost less to run.
- Energy efficient/ gives better light/ purchases in the first place because of energy cost saving/
- Energy saving
- Environmental benefit, would hope it does less damage to environment. Less energy used.
- Fit into my light fittings/ use less power than a high wattage globe.
- For their energy efficiency .
- Good for the environment use less electricity.
- Good light , cheaper to run, last longer.
- Good light, long life.
- Had normal fluorescent lights and they seem to last longer than normal ones.
- Helps to save the environment.
- I think because they last longer than normal light bulbs are more economical to purchase than normal bulbs.
- I think that the time that they last is much more convenient than regular globes. I don't like changing globes all the time so it would be good idea.
- I think the fluoro lights are better because they are more energy efficient than regular globes.

- *I think the fluoro lights would be better than regular globes as the extra money that you spend on purchasing them is money that you can save on the power bill.*
- *I think they are a better idea as they are better for the environment than regular globes.*
- *I think they are better for the environment than regular globes because they use less energy.*
- *I think they are better than regular globes as they last longer and don't have an unpredictable life span, as regular light-bulbs do.*
- *I think they would be nice in a room because the white light is not as harsh as the normal lights.*
- *If new thing on the market should be better buy.*
- *If they are not turned on or off regularly/ it will shorten their life/ they last longer than regular light globes.*
- *If they save more energy than regular globes that would make it a better choice for lighting as it's also better for the environment.*
- *Improvement for cost to run more reliable last longer than normal globes – saves time changing lights/ convenience.*
- *In certain areas they are a lot better to use.*
- *In long run – energy saving, cheaper to run.*
- *It has all the benefits/ long life, less power.*
- *Last a bit longer than incandescent globes.*
- *Last longer – at least twice as long as the original light globes.*
- *Last longer. – don't replace as often as normal globes.*
- *Last longer/ more energy efficient/ saving more in the long run.*
- *Last longer/ than ordinary ones.*
- *Last much longer.*
- *Lasts longer / more energy efficient/ cost efficient.*
- *Lasts longer than normal globes.*
- *Less electricity, last longer.*
- *Less electricity/ costs less to run.*
- *Less greenhouse gas emissions/ lower energy consumption.*
- *Less power.*
- *Less power/ same lighting / better for environment.*
- *Light up a room better.*
- *Light wasn't as bright as a conventional light/ liked it better.*
- *Like the white light/ doesn't hurt my eyes.*
- *Long lasting / than ordinary globes.*
- *Long lasting, cost of running is less use less electricity*
- *Long lasting, more energy efficient.*
- *Long life and low use of electricity make them better than regular light bulbs.*
- *Longer lasting more reliable.*
- *Longer lasting.*
- *Longer life*
- *Low energy .*
- *Low energy usage means they last longer than regular bulbs, which means you don't have not change them as often.*
- *More cost effective/ longer use/ buy less frequently.*
- *More economical because they use less electricity .*
- *More efficient/ last longer/ use less energy.*
- *More expensive so must be better and better technology.*
- *More reliable, more economical.*
- *Much brighter.*
- *Nicer light, lasts longer.*
- *Only because of the lower electricity usage.*
- *Our electricity bills have gone down a lot, about \$30.00 per quarter since changing over to them in as many light fittings as possible.*
- *Pay more but lasts longer and saves on electricity.*
- *Reliability/ cost effective/ last longer.*
- *Replace less/ use less electricity.*
- *Save a bit on power bill.*
- *Save electricity which in turn saves fuel which is better for the environment.*
- *Save energy which is good for the environment and the household bills.*
- *Save energy, last longer, save money.*
- *Save money – use less electricity, last longer.*
- *Save money and last longer. Being a pensioner I have to watch my pennies so that's what it's all about.*
- *The compact globes are much better for the environment than incandescent globes and they save more energy than regular globes.*
- *The energy used is minimal in the compact lights and this is better for the environment. Even though they cost a little more than regular bulbs it is worth its as they also last longer than regular bulbs.*
- *The fluoro lights are better than normal bulbs as they save more electricity and energy.*
- *The globes are probably better for the wallet in the long run. I wouldn't mind spending money on a fluoro if it lasted a lot longer than a regular globe.*
- *The light in the fluorescent globes is much nicer than regular globes and they are also much more energy efficient than regular globes.*
- *The light is better/ cooler light / doesn't hurt your eyes.*
- *The light is much nicer to look at than regular lights.*
- *The overall thing is they are cheaper to run/ cost half as much as ordinary globes.*

- *The quality and colour of the brightness of the light for my art studio is much more effective than regular light bulbs. I can see my work much better than I could with normal bulbs.*
- *The white light makes a better glow in the room than regular light bulbs.*
- *They are better than regular bulbs because of their long lasting ability, they do cost more than regular bulbs but if works out to be more economical to use the fluoro lights.*
- *They last longer and you are only being charged for 15 watts for a 70 watt light output.*
- *They last longer which is good, because our ceilings are too high to be changing globes frequently.*
- *Value for money – especially with power surges as they don't blow out.*
- *Want brighter light more readily available/ light glow is attractive*

**\*\* Examples of reasons for thinking that CFLs are a worse proposition than incandescent globes:**

- *A 60 watt CFL is not enough light to fill a room, not enough experience with other wattage CFLs to know more.*
- *Advertising says that they should be better than normal globes, but they aren't worth the money.*
- *All the advertising and giving them away at Post Office 12 months ago (1 Per Person). They obviously wanted to get rid of them because they aren't any good.*
- *Depends on the purpose that the light is used for. They look silly as a bare globe*
- *Don't fulfill my needs.*
- *Don't light up room as well as normal light globes.*
- *Don't like that kind of light effect on my eyes.*
- *Don't like the fluoro, hard light.*
- *Don't like the light they throw off – far too harsh.*
- *Financially worse, environmentally better.*
- *Fluorescent lighting gives you headaches with the flickering and the brightness affects your eyes.*
- *Have not yet used the one given to me by Sydney Electricity as we don't use enough electricity to justify having someone come out to put it in, until the old one blows, you see we are quite old and have 12 foot ceilings.*
- *Haven't seen full difference achieved – for example a 100 watt incandescent light can illuminate our lounge room easily, whereas a CFL that claimed to be equivalent to 100 watts only gave out about 40 watts of light and it was an eerie light at that.*
- *Hurt eyes. Too bright, too white.*
- *I don't like fluorescent lights at all, the white light is more harsh than regular lights and they are unpleasant to have in a home.*
- *I don't like the white light, it's not as pleasant as regular bulbs.*
- *I think they are better than regular light bulbs but because they didn't fit my lampshade I can't use them, so they are useless, really.*
- *If could use in all situations I would use more, but they don't fit into most of my light fittings.*
- *If you are paying more for a CFL there should be cuts elsewhere, like in your power bills, but ours has gone up so I won't be buying any more.*
- *If you get a dodgy one you are worse off because you've paid a lot more for it – and I think we've had more than our fair share of dodgy ones, I'm afraid.*
- *It's a new innovation, they started out sounding good, but they should be better, should last longer than they do.*
- *Light is too white a light.*
- *More expensive so more likely to use if own your own home. Renters wouldn't use them as you'd be paying for a globe that someone else benefits from*
- *Not a good light for reading.*
- *Not price or performance competitive.*
- *Promise is that they deliver same lighting at a lower cost for electricity, but they are duller, they flicker more and our bill hasn't dropped.*
- *Some very hard on the eyes.*
- *Supposed to save energy, but they must use more as they are heavier.*
- *The only bad thing about compact fluoros is the cost, as they are more expensive than incandescent globes. They are more energy efficient than normal globes, which is better for the environment, but they still cost more to run overall.*
- *Their only downfall is that they cost too much and this has prevented me from trying them.*
- *They are a newer type of thing, I'll wait until they prove themselves before I'll risk buying them.*
- *They cost more and they are no better as they don't last any longer.*
- *They cost more money than normal light-bulbs and use more electricity than regular bulbs.*
- *They look ugly.*
- *We won't use them again as they are aesthetically displeasing.*
- *Who really knows whether you get you're money's worth pay \$12.00 for CFLs and 60c for incandescent.*

**Table 17: Q. Depending on the brand and size, the packaging sometimes says they last around, 6,000, 8,000 or 10,000 hours, or they might say they last 3, 4 or 5 years. If the packaging for a light says it lasts 8,000 hours, which of the following statements best describes what you think this means...[READ OUT PRECODES]**

<i>All respondents: Base = 600</i>	All %				City	
		Heard and bought %	Heard but not bought %	Not heard of %	Sydney %	Melbourne %
Every light you buy of that type will last at least 8,000 hours	31.3	30.5	28.4	36.3	31.1	31.1
Every light you buy of that type will last very close to 8,000 hours	32.0	34.0	30.9	31.3	30.1	33.2
About half the lights will last a bit longer and about half will last a bit shorter time than 8,000 hours	20.7	22.7	21.0	15.0	17.5	22.4
About half the lights will last much longer and about half will last a much shorter time than 8,000 hours	6.3	4.3	8.6	7.5	6.8	6.1
Other	3.0	2.1	3.7	3.8	2.9	3.1
Unsure	6.7	6.4	7.4	6.3	11.7	4.1
		Gender		Age		
	All %	Male %	Female %	18 to 39 years %	Over 39 years %	
Every light you buy of that type will last at least 8,000 hours	31.3	35.3	28.4	32.4	30.4	
Every light you buy of that type will last very close to 8,000 hours	32.0	23.5	38.1	35.2	30.4	
About half the lights will last a bit longer and about half will last a bit shorter time than 8,000 hours	20.7	22.7	19.3	21.3	20.4	
About half the lights will last much longer and about half will last a much shorter time than 8,000 hours	6.3	7.6	5.7	9.3	4.7	
Other	3.0	4.2	1.7	0.0	4.7	
Unsure	6.7	6.7	6.8	1.9	9.4	

**Table 18: Q. Only those compact fluorescent lights that meet government minimum performance standards are allowed to be sold in Australia, but some perform far better than others. Would you be in favour or not in favour of an endorsement label being added to the packaging of compact fluorescent lights which meet a higher standard of performance? PROBE: very much or a little?**

<i>All respondents: Base = 600</i>	All %				City	
		Heard and bought %	Heard but not bought %	Not heard of %	Sydney %	Melbourne %
A lot in favour	56.3	63.8	55.6	43.8	53.4	57.7
A little in favour	28.7	24.8	24.7	38.8	29.1	28.6
Neither/nor	5.3	6.4	3.7	5.0	2.9	6.6
A little not in favour	2.3	2.8	3.7	0.0	1.9	2.6
A lot not in favour	2.0	0.7	3.7	2.5	2.9	1.5
Unsure	5.3	1.4	8.6	10.0	9.7	3.1
	All %	Gender		Age		
		Male %	Female %	18 to 39 years %	Over 39 years %	
A lot in favour	56.3	55.5	56.3	50.9	59.2	
A little in favour	28.7	26.9	30.1	38.0	23.6	
Neither/nor	5.3	6.7	4.5	5.6	5.2	
A little not in favour	2.3	3.4	1.7	1.9	2.6	
A lot not in favour	2.0	2.5	1.7	1.9	2.1	
Unsure	5.3	5.0	5.7	1.9	7.3	

**Table 19: Q. As CFL lights carrying the endorsement label are likely to be better made, they are likely to cost a bit more to buy. If the extra cost was reasonable, how likely is it that you would buy the endorsed ones: would you definitely, probably or possibly buy, or wouldn't you buy the endorsed one?**

All respondents: Base = 600	All %				City	
		Heard and bought %	Heard but not bought %	Not heard of %	Sydney %	Melbourne %
Definitely buy the endorsed one	26.7	30.5	23.8	22.5	28.4	25.5
Probably buy	39.3	39.7	40.0	37.5	38.2	40.3
Possibly buy	24.0	20.6	26.3	28.8	23.5	24.5
Would not buy*	6.7	6.4	7.5	6.3	5.9	7.1
Unsure	3.0	2.8	2.5	5.0	3.9	2.6
		Gender		Age		
	All %	Male %	Female %	18 to 39 years %	Over 39 years %	
Definitely buy the endorsed one	26.7	30.3	24.4	18.5	31.4	
Probably buy	39.3	38.7	38.6	45.4	35.6	
Possibly buy	24.0	20.2	27.3	28.7	21.5	
Would not buy*	6.7	5.9	7.4	4.6	7.9	
Unsure	3.0	5.0	1.7	1.9	3.7	

\* Examples of reasons for not buying label-endorsed CFLs:

Re: endorsement labels:

- If Government endorsed them, I would buy, but not if it's the manufacturer.
- Don't look at endorsement labels, they wouldn't influence decision. I make up my own mind, thanks.
- Endorsement labels are a bit of a gimmick. Sometimes they are something that you can just put on your product if you have the money to afford to do so, therefore only serving to increase prices.
- You'd have to convince me it was a legitimate endorsement – some of them, like the Heart Foundation's 'tick' label are just a con.
- It's like the gold medals on wine labels, anybody can apply a label that looks like it is endorsing their product but it's them who have made it up themselves.

Re: cost:

- You'd be paying a lot more for something that's only a little better.
- Don't use them on regular basis, so it's not necessary to buy expensive ones.
- Don't want to pay more as only have a limited number of globes
- I only have a low electricity bill so it doesn't matter.
- Cost is too high anyway so wouldn't be willing to pay any more.
- Only buy the cheapest.
- Only have one in because it was given to us by the electricity company – wouldn't be worth paying for, though, as it's too dull.
- Would buy the cheaper old-style ones because I want to spend less money.

Re: packaging:

- Because I don't believe what is written on the packaging.
- I assume they are telling lies from past experience of advertising.
- Can't believe the packaging.

Re: performance:

- Not happy with light they give out.
- They all flicker too much for my liking – an endorsement label isn't going to stop them flickering.

**Table 20: Q. How much extra would you be prepared to pay for an endorsed compact fluorescent light over one not carrying the endorsement... up to 10% more, 10 to 25% more, 25 to 50% more, 50 to 100% more or more than double the cost?**

<i>Among those who would buy endorsed ones</i> Base = 542	All %				City	
		Heard and bought %	Heard but not bought %	Not heard of %	Sydney %	Melbourne %
Up to 10% more	55.6	60.2	51.4	53.5	51.1	58.2
10 to 25% more	24.4	23.4	25.0	25.4	21.7	26.0
25 to 50% more	8.5	6.3	13.9	5.6	12.0	6.8
50 to 100% more	1.9	3.1	1.4	0.0	2.2	1.1
More than double	1.9	0.8	2.8	2.8	2.2	1.7
Unsure	7.8	6.3	5.6	12.7	10.9	6.2
		Gender		Age		
	All %	Male %	Female %	18 to 39 years %	Over 39 years %	
Up to 10% more	55.6	40.6	65.4	44.0	62.7	
10 to 25% more	24.4	31.1	20.8	35.0	17.8	
25 to 50% more	8.5	13.2	5.0	10.0	7.7	
50 to 100% more	1.9	2.8	1.3	1.0	2.4	
More than double	1.9	4.7	0.0	4.0	0.6	
Unsure	7.8	7.5	7.5	6.0	8.9	