



mt7 Report

IEA DSM Programme Task VII
*'International Collaboration on
Market Transformation' (mt7)*

MT7 Market Research Industry Consultation

energy efficiency *Stimulating demand for buying 'energy efficiency'*
demand
branding

<http://dsm.iea.org>

International Energy Agency
Implementing Agreement for Co-operation on
Technologies and Programmes for Demand Side Management

IEA DSM Task VII

International Collaboration on Market Transformation

Market Research Industry Consultation Results from the Final Phase of Task VII

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IEA Demand-Side Management Programme

The International Energy Agency (IEA) was established in 1974 as an autonomous agency within the framework of the Economic Cooperation and Development (OECD) to carry out a comprehensive program of energy cooperation among its 26 Member countries and the Commission of the European Communities.

An important part of the Agency's program involves collaboration in the research, development and demonstration of new energy technologies to reduce excessive reliance on imported oil, increase long-term energy security and reduce greenhouse gas emissions. The IEA's R&D activities are headed by the Committee on Energy Research and Technology (CERT) and supported by a small Secretariat staff, headquartered in Paris. In addition, three Working Parties are charged with monitoring the various collaborative energy agreements, identifying new areas for cooperation and advising the CERT on policy matters.

Collaborative programs in the various energy technology areas are conducted under Implementing Agreements, which are signed by contracting parties (government agencies or entities designated by them). There are currently 40 Implementing Agreements covering fossil fuel technologies, renewable energy technologies, efficient energy end-use technologies, nuclear fusion science and technology and energy technology information centres.

The Demand-Side Management Programme is a new collaboration. Since 1993, the 17 Member countries and the European Commission have been working to clarify and promote opportunities for DSM.

Australia	France	Spain
Austria	Greece	Sweden
Belgium	Italy	United Kingdom
Canada	Japan	United States
Denmark	Korea	
European Commission	Netherlands	
Finland	Norway	

A total of 10 Tasks have been initiated, 5 of which have been completed. Each Task is managed by an Operating Agent from one of the participating countries. Overall control of the program rests with an Executive Committee comprised of one representative from each contracting party to the Implementing Agreement. In addition, a number of special ad hoc activities--conferences and workshops--have been organised. The Tasks of the IEA Demand-Side Management Programme, both current and completed, are as follows:

Tasks:

- Task I* International Database on Demand-Side Management
- Task II Communications Technologies for Demand-Side Management
- Task III* Cooperative Procurement of Innovative Technologies for Demand-Side Management
- Task IV* Development of Improved Methods for Integrating Demand-Side Management
- Task V* Investigation of Techniques for Implementation of Demand-Side Management Technology in the Marketplace
- Task VI* DSM and Energy Efficiency in Changing Electricity Business Environments
- Task VII International Collaboration on Market Transformation
- Task VIII Demand Side Bidding in a Competitive Electricity Market
- Task IX The Role of Municipalities in a Liberalised System
- Task X Performance Contracting

* completed Task

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Background

The Market Transformation Task is operated under the International Energy Agency's Demand Side Management Implementing Agreement. The work of Task VII has been supported by government agencies from 7 countries including Denmark, Finland, Netherlands, Norway, Sweden, Korea and the United Kingdom.

A central goal of the work has been to find a better way to market energy efficiency. In this sense, the Market Transformation Task shares a common goal with much of industry – industry has developed some great energy efficiency products - and Task VII is interested in exploring ways that would help more of them to be sold.

Task VII is interested to know why it is that energy efficiency is so low down on the consumer's hierarchy of needs. Why do some retailers and manufacturers shy away from selling the benefits of the energy efficiency of their products? Can we make 'energy efficiency', as a marketing concept, as popular as organic food is? And how might this be done?

To meet this challenge and to answer some of these questions, Task VII organised and carried out a survey of 6 European countries (Denmark, Finland, The Netherlands, Norway, Sweden and UK) to measure knowledge and attitudes towards efficient use of energy in private households. The intention was to use these findings to stimulate new methods of targeted marketing amongst energy efficient product manufacturers.

The study explored attitudes and behaviour in the field of energy efficiency and then related these to typologies and value patterns. Understanding the characteristics of these typologies and value patterns is seen as crucial for those wishing to market their energy efficient products and services effectively.

To the best of the authors knowledge, no such international investigation had ever been undertaken with an emphasis on analysing attitudes, habits and the use of energy efficient products and how these correlate to an individual's specific socio cultural cluster.

The results, which are available in a published report¹, conclusively proved that a cross-country analysis of public attitudes on energy efficiency was possible. The results also provided invaluable information that is needed when talking about “selling” energy efficiency as a concept with multinational market actors and industry.

The research explored a number of issues vital to understanding the complex purchasing patterns of the domestic user of energy including a dialogue on brand attraction, knowledge of energy saving efforts, energy saving actions, use of energy saving light bulbs, energy efficient behaviour and willingness to pay for products labelled with special energy efficiency symbols.

The report’s findings are based on both bivariate and multivariate analysis and include some interesting findings for those involved in energy efficiency, and for product manufacturers who produce efficient products. For instance, at least 2/3 of the 6000 strong survey sample were willing to pay more for products labelled with special energy efficient symbols – good news for those in the electronics industry who may be concentrating efforts on increased product efficiency.

This critical marketing data has enabled Task VII participants and industry to explore new promotional ideas for energy efficiency and to seek solutions that will increase consumers’ desire for energy efficient products and services.

It is hoped that various market actors will use the information from the market research to develop a ‘brand’ approach to energy efficiency. This ‘brand’ approach would focus more strongly on people as brand aware, self-conscious consumers. Thereby lifting promotion of energy efficiency beyond the usual ‘save money and the planet’ arguments and seeking to identify energy efficiency with the lifestyles, values and attitudes that currently drive consumer purchasing.

With these issues in mind, a series of meetings were held with major electrical product manufacturers and retailers throughout Europe. One of the primary conclusions of the research was that the marketing challenge for the branding of energy efficiency was not a question of spreading knowledge but of establishing image. The Task aimed to share the results of the market research in order to help with the inherent challenges in creating a brand attraction for energy efficiency.

¹ 2003 Ryan, V. and Dalen, E; Branding Energy Efficiency : A Multinational study of knowledge and attitudes towards efficient use of energy in private households; IEA DSM; available from dsm.iea.org

Introduction

The following summary report is a result of meetings and telephone conversations with over ten separate appliance manufacturers. Three face to face in depth meetings were held with three of the companies at their premises, and a further eight companies were contacted and interviewed more informally through email and telephone conversations.

In order to retain confidentiality and to protect commercially sensitive information, the responses are provided as a general discussion and comments are not identified to particular companies. In many instances quotations are provided which are edited versions of the actual words said at the meetings – these may have been altered to make this document more readable or to provide a suitable context, but the overall message of the core material remains intact.

Task VII would like to thank the following companies for taking part and assisting us with this work:

- Philips
- Siemens
- Merloni Domestic Appliances
- Dyson
- Lampholder
- Gent 24
- Vauxhall
- Abacus Lighting
- Compact Lighting
- Malvern Boilers
- BEKO UK

Methodology

The idea behind the final phase of Task VII work was to engage industry in dialogue about marketing and branding the concept of energy efficiency. To this end a series of meetings was organised between Task VII and leading international manufacturers of energy using products. Initially the focus was on those companies that were producing the best energy efficiency products as part of their product portfolio – although a wide range of views were sort from other appliance manufacturers.

The meetings followed an informal but pre-prescribed format where the Task VII operating agent provided a summary of the market research findings² and used this as the springboard for discussions. Industry was then asked a series of pre-determined questions to facilitate an open discussion. The meetings were guided but focused on developing creative insights into industry's unique view of energy efficiency as a marketing concept. A selection of industry views are provided in the following section with responses summarised under the headings of the relevant discussion questions.

Results

1. What is your company doing regarding the energy efficiency of your product range – and why?

All of the companies that met with Task VII were market leaders in terms of the efficiency of their products and almost without exception the companies contacted claimed that they were developing and marketing energy efficient products. As an example, one of the companies taking part no longer sells any fridge that has an EU energy label rating below an 'A'. Another company expressed the desire to be 'the best for the consumer and the environment' – and with this in mind claimed that the environmental and energy considerations of a new product are always considered one of the most important aspects of the design.

2. What drives your company to steadily improve the efficiency of your products? i.e.: why is your company pursuing / not pursuing greater energy efficiency in your product range?

All of the companies taking part in the discussions provided similar responses to this question. As might be expected a multiplicity of reasons were provided, all with varying degrees of importance in relation to the development of ever more efficient products. Legislation, including future minimum standards and best practice standards, is obviously used as a guide for these companies. However, because of their nature as market leaders, in most instances the participating companies were well in advance of any current minimum standards.

Voluntary agreements for standards of efficiency also featured in the discussions – and these were well regarded by industry as a whole. Once again, as market leaders, the companies responding felt that voluntary agreements tended to favour

² 2003 Ryan, V. and Dalen, E; Branding Energy Efficiency : A Multinational study of knowledge and attitudes towards efficient use of energy in private households; IEA DSM; available from dsm.iea.org

their products in the market against competitors less efficient ranges and so were welcomed. One company stated that "...voluntary agreements have kept the products well above the minimum standards of efficiency – for example in relation to cooking products we now have nothing lower than a C rated product".

One of the most interesting aspects of the responses received from all companies was that they felt that energy and environmental considerations were now intertwined with their company's philosophy – and at least two of the companies had policy statements from the owners or chief executives to back this up (as well as corresponding environmental reporting statements). One company stressed that the environment now played a part in terms of its brand image – and that they saw some mileage in terms of market niche through provision of caring and environmentally aware brand. However, this message did not highlight the energy use of the products specifically – it traded more on the overall environmental awareness associated with utilising recycled materials, avoiding harmful chemicals (CFC's in refrigeration equipment for instance).

Another company spoke of 'self driven ambition' from the main manufacturers to provide environmentally and energy friendly products. However, this statement was tempered with the additional observation that 'industry isn't just doing this on the basis of idealism... certain markets like Germany will support this approach thanks to the greater environmental awareness of consumers'.

One of the companies expressed a desire to be 'environmentally competitive' although they were realistic that this was not the driving priority for their business. In terms of efficiency of their product ranges they have been focussing on those products immediately affected by the EU energy label – with washing machines and refrigerators being the most important and most advanced in terms of efficiency. The introduction of labelling for ovens has now inspired a rethink of their product range in this area so that none of their products falls below a 'B' rating – i.e. they are focussing their efforts in the order of most impact from the current EU energy labelling scheme.

In terms of the market forces driving energy efficiency, one company strongly believed that the introduction of the A+ and A++ scheme for labelling was driving development in the refrigeration and washing appliance sectors – in fact some 60% of their washing machines were rated as A+ and were selling well despite a price

differential in comparison to less efficient products. This was put down to consumers' relative knowledge of the label in this particular sector, and the relationship between the 'A for energy' and the 'A for washing performance' which tended to provide a dual selling point.

One of the companies indicated that they were stimulated by the desire to keep up with what their competitors were doing – in this way they weren't trying to lead in terms of efficiency – but rather 'not get left behind'. However, they clearly stated that this attitude would change almost overnight if market pull could encourage consumers to value efficiency as an item high on a list of consumer priorities.

3. What does your company see as the size of the market place for energy efficiency products?

Most companies agreed that the general levels of awareness of environmental issues had improved the size of the marketplace for energy efficient products but many felt that it was something of a 'chicken and egg' situation – i.e. it may be that with increasing standards of efficient products consumers are in turn coming to expect more in terms of the performance and efficiency of their appliances.

One company spoken to has completed their own research into how consumers perceive the importance of energy efficient products and argue that energy efficiency is "definitely moving up the shopping list."

Certainly at an industry level there was agreement that energy efficiency and other environmental issues were becoming increasingly important – but this in part has been driven in the European market by directives such as the EuP and WEE directives³.

4. Has energy efficiency featured as a concept in the marketing of your products in the past?

If yes, what was the reaction?

If not, why not?

Some of the participating companies alluded to the fact that some of their sub brands are marketed on the basis of their efficiency but on the whole it is not seen as a differentiator in the market place. As one company put it "All the main competitors

³ EuP - Energy Using Products and WEE - Waste from Electrical and Electronic Equipment, are European Directives aimed at increasing efficiency and reducing waste.

have very similar levels of efficiency - so as a manufacturer it is difficult to create a market niche out of something that you share with your competitors... instead of 'efficiency' we prefer to use words like 'innovation and technology'." This led on to a discussion relating to the fact that 'technology' gives you thousands of differentiating variables to play with in a marketing sense – whereas energy efficiency only provides one and even then it is not 'visible'.

One company suggested that the very top products cannot be sold on the basis of their efficiency – these are luxury brands that appeal to consumers because they are perceived as being 'the best' – and this includes all aspects of the design including efficiency. It is simply assumed that the top products will already be the most efficient- and it was thought that the consumer might think it strange to highlight this feature. As a suggested analogy "a car already has four wheels – so you would not sell your latest luxury car using 'has four wheels' as a top line selling point!"

Another company suggested that marketing the energy efficiency of your product range as the key focus would only be worthwhile if you could guarantee the long term position of being 'number one energy efficient equipment supplier' – and that this would take such a major change of marketing focus, and possibly product development focus, that it would not be worth the risk. Obviously retaining the number one slot in such a market is somewhat out of the individual manufacturer's control – as it is dictated in part by the behaviour and ability of your competitors.

One company suggested that the energy rating of their washing machines was used as a feature of their marketing, but mostly in relation to the 'triple A' rating that they could claim for A energy, A wash performance and A spin performance. This clustering of 'advantages' was considered to be a simple enough message to get across to the consumer and has proved a strong selling point (although, once again, most industry leaders also sell their machines with the same 'advantage')

5. Many 'A' rated products can achieve a higher profit margin – so is this a good reason to produce such products?

The basic premise of this question was challenged by two out of the three companies that met face to face with Task VII. The higher profit margin is usually balanced out by an increase in costs in the R&D phases (Research and Development). One company specifically sited the fierce competition in the appliance market place as a

reason why it would be 'commercial suicide' to pour too much money into efficiency related R&D. They claimed that a large amount of time and money could go into providing a market leading super efficient product, only to have that technology replicated by the competition within months of bringing this product to market. In the words of the company concerned "we want to be market leaders – but only just at the top of the market and not too far out in front". Once a 'limit to efficiency' had been achieved it was easy for the competition to obtain similar levels for similar prices but with less money spent on original R&D (presumably through corporate espionage and/or copying features of available products).

Most participating companies claimed that in the majority of product categories the products are approaching the thresholds of what is possible within the limits of current technology. Greater efficiency gains, it was claimed, would require an expensive 'step change' to new 'low carbon' technologies. Once again, investment in these technologies was seen to be too risky because of the constraints that manufacturers face in terms of their competition and the record low prices of 'ordinary' equipment. Examples of this include vacuum panels for fridges, catalyst heaters for cookers and heat pumps for driers. Companies are undoubtedly investigating the possibilities of these technologies but the 'step change' required to bring these products to market would add too much cost for consumers (in some instances doubling the price for an individual product). This does point to the usefulness of procurement exercises, as it was claimed that "these technologies would certainly be pursued if we as manufacturers could be 100% confident that there was a guaranteed market for them."

6. Energy efficiency is often thought of as an intangible quality – are there any features of your products that it could be associated with (for example with quietness or lack of noise)?

One company suggested that the old marketing adage of 'put the money where you can see it' was partly responsible for the lack of awareness of efficiency. As an illustration, the intangible nature of energy efficiency meant that R&D may be more readily spent on designing a fridge with an LCD screen on the front of it than investigating vacuum panel technology which the consumer may not see, but would obviously provide efficiency gains (albeit at a significant cost).

7. Do you feel anything is lacking in terms of support from government agencies attempts to promote greater energy efficiency?

As expected the promise of subsidies was highlighted as a result of this question. All companies suggested that the best thing that any government organisation could do to increase the uptake of energy efficient products would be to incentivise consumer choice through subsidies. A particular example in Denmark was provided, where consumers were 'queuing up down the street' to replace their old fridges following the introduction of a subsidy scheme for A rated appliances. Similar success has been seen for sales of other equipment in other EU countries – most notably the Netherlands.

The companies seemed unified in the belief that price was possibly the biggest influencing factor in terms of mass consumer choice – and that a subsidy makes it easy for a consumer to choose a more efficient product through reducing the differential in costs when a more efficient (and usually better made) product is compared to a cheaper less efficient alternative. This highlights the commonly held view that the consumer does not always act rationally – saving 10% on the purchase price of an appliance whilst spending double this on energy related costs over the lifetime of the product.

A further interesting point was brought up related to the education of a consumer as part of a subsidy campaign. One company noted that the consumer's eye for a bargain draws them into a discussion as to why the government might be subsidising certain products – so providing point of sale information in relation to the subsidy scheme served to educate the consumer into more sustainable patterns of consumption – and possibly use.

One company mentioned the relatively cheap price of energy as a reason why energy efficiency featured so low down on the consumer's hierarchy of interest. They have noticed a trend indicating increased consumer awareness of the efficiency of products when the price of energy goes up (from their own market research conducted across countries with varied energy prices). It was noted that in countries with relatively expensive energy prices the awareness of product efficiency was higher than in those countries with cheaper energy.

Another company suggested that a government campaign supporting the purchase of A+ and A++ products would be welcomed. Currently markets in Germany and Denmark are leading the uptake of A+ and A++ products because of very high energy prices. As one company stated '...a concerted effort by government in other

countries to help manufacturers to broaden the market for these appliances would be excellent – and coupled with a subsidy... even better!'

In terms of government organisations approach to the promotion of energy efficiency, one company noted that there was a need to centralise resources more in comparison to today's 'rather scattered efforts'. This company suggested that there were too many people doing too many things – thereby probably duplicating effort and creating confusion in the marketplace.

As part of the solution to a general lack of awareness in energy efficiency one company suggested better education regarding the current labels in each country would be useful – suggesting that ultimately awareness of energy efficiency and information about labelling could be provided in schools.

Another company stressed that "Consumer demand/awareness needs to be raised by both Government, manufacturers and retailers – there are three main actors in this and we need a co-ordinated approach".

8. What could 'marketeers' be doing to increase the demand for energy efficient products?

This seemed to be a difficult question for companies to answer – perhaps because the marketing staff interviewed felt that if there was more that they could do they would already perhaps be doing it. What came across from most companies in the meetings was the idea that their job was to produce and sell their appliances – and they were already making them about as efficient as they could given price constraints.

They seemed to share the view that it was the responsibility of governments to educate and inform people, and indeed of consumers to educate themselves regarding energy efficiency. However, participating companies did share a common desire to be involved in promotion of more efficient products – particularly if the market demand could be stimulated to the point that they could lift prices, even a little. At least one manufacturer was concerned about continuous price deflation in the appliance market. In an anecdotal aside one respondent claimed that when the first horizontal washing machines were produced they cost the equivalent price to the British 'Mini' car available at the time – some £600. In today's market the Mini retails

in the UK for around £12,000 – whereas a new washing machine might cost as little now as £250. It was claimed that this price deflation was driven by ‘greedy retailers’ wanting extra margin and imported products from low labour wage countries.

The participating companies were in broad agreement that point of sale material needs to be improved. One company stated that “Increased costs of efficient equipment versus the ‘in-use’ savings need to be better promoted to the consumer - with a view to informing the consumer how much an appliance costs over a lifetime of use”. Another company stating that “Retailer sales staff need to be better trained so they can “inform” and “educate” consumers appropriately”. During this discussion the ‘chicken and egg scenario was again raised - “The focus should be centred on the demand side of the market e.g. the consumer. If the consumer was “informed” and “encouraged” to purchase on the basis of energy efficiency then the retailers and the manufacturers would have to supply to that market.”

Most companies shared the view that the promotion of energy efficiency should be pursued with more imagination and creativity than it has been in the past. There was general agreement in the findings of the Task VII Market Research, which suggests that marketing communications should not simply focus on arguments relating to cost and environment saving, but should also broaden the appeal to consumers’ aspirations and values systems. However, there was also agreement that the challenge ahead was not an easy one – and no simple solution was found to answer the difficult dilemma of how to make energy efficiency ‘sexy’.

9. Other general comments / issues

One company questioned the validity of a market transformation exercise in the appliance manufacturing market at all. This was on the basis that most products, certainly in respect to refrigeration and washing machines, are now about as efficient as they are going to get. Far better, this company suggested, to concentrate efforts in heating and lighting where greater scope for savings would be possible. The example of the relative lack of success of compact fluorescent technology compared to far less efficient tungsten lighting was illustrated. Despite the advances in technology and the massive savings possible consumers were still resisting the replacement of old tungsten technology for the more efficient modern equivalent.

Most companies agreed that the retailers played a major role in which products are promoted to the consumer and hence, sold. One company stated, not unreasonably, that 'profit margins drive the market'. Retail purchase managers look at the purchase price and selling price – and then make a very simple calculation as to which products provide them with most profit – these are then the ones that are promoted most heavily regardless of the benefits to the consumer. This tended to back up the idea that the consumer 'pull' for more efficient products is a major part of the solution in terms of transforming the market – as one company put it “it is only when a consumer goes into a shop and asks about the efficiency of a product that the standard sales pitch has to change – and then the retailer then has to respond to a different set of consumer desires.”

10. Would you be supportive of a wide scale strategic marketing campaign aimed at promoting sales of more efficient products based on the brand value (aspirations and values) of consumers?

All of the companies that met with Task VII were supportive of a brand approach to marketing energy efficiency with varying degrees of enthusiasm.

One company was very interested in the concept of utilising the A+ and A++ schemes. If A+ and A++ could be linked to 'innovation' by an EU wide strategic marketing campaign they claimed that they would definitely be interested.

Other companies expressed a desire to take part on the basis of positioning their companies environmental profile – and one claimed that if such a campaign were to go ahead that they couldn't afford to not take part. One company suggested that a global campaign would be as welcome as an EU wide one claiming that “There needs to be a global branding of energy efficiency in order to raise consumer awareness sufficiently. Once up and running this energy efficiency logo could be used as an 'added value' marketing factor to differentiate products across a given range.”

11. Comments related to Task VII Market Research

The results of the research conducted as part of Task VII generated a significant amount of interest amongst the industry representatives. As a general comment it appeared that the research backed up and reinforced similar market research conducted by the various companies meeting with Task VII. Of particular interest was the multi-national approach to the study and the realisation that a

communication or marketing strategy focussing on the values and aspirations of consumers would be possible for energy efficiency across the range of countries taking part in the research.

Conclusions

Some useful lessons have been learned and significant achievements made during the progress of Task VII. This report summarises the results of the last phase of Task VII work relating to industry viewpoints and it should be read in conjunction with the Market Research report. Some relevant conclusions can be drawn from both reports, and overall from the results of the IEA DSM Task VII work. In summary these are as follows:

1. Market Transformation, and the range of tools employed by it such as labelling, procurement, voluntary standards, legislation etc, has played a significant role in raising the efficiency of products across many of the IEA countries and particularly EU countries taking part in the Task work.
2. The limits to efficiency (within cost effective parameters) have been reached in many product areas (or so industry claims). A technological step change is now required to deliver a significant increase in efficiency – and this may require government support in order to deliver low carbon technology in ordinary household products.
3. Industry is not only aware of environmental and energy related issues but they are incorporating them into the highest levels of company policy and are committed to integrating these issues into their product ranges.
4. If the market pull and demand for efficient products can be stimulated sufficiently then manufacturers and retailers will almost certainly respond by improving their point of sale information and will start to highlight efficiency as part of their marketing portfolio – this in turn will stimulate the production of market leading efficient products.

5. As a result of meetings with industry, many of the general conclusions drawn from the Task VII market research have been confirmed. These include that:
- a. People are aware of the benefits of energy efficiency products - but don't always act in a rational way - they may be more susceptible to aspirational and value driven choices
 - b. The Interesting part of the market, consisting of young, knowledgeable, high-income people are also willing to pay more for brand values. This 'materialist consumerist' target market is highly influential and often leads trends in consumer purchasing. This part of the market has been largely ignored in traditional energy efficiency marketing which focuses on 'cost and environment' arguments.
 - c. An opportunity exists for government to collaborate with industry to develop marketing and branding where the driving force is not the traditional:"saving energy and money and environment", but where the Transformation of the Market is driven by the purchasers' belief that their choices will add value to themselves or their companies in the form of image, prestige, respect.
 - d. Task VII Research results enable multinational manufacturers and retailers to develop a marketing communication platform that will work across several countries. Many appliance manufacturers have expressed an interest in developing such a communication platform.

Since Task VII began the efficiency of appliances, at least on the EU market, has steadily improved. Overall the discussions with industry have provided a positive outlook regarding the future of energy efficient appliances. It seems that many of the market transformation tools employed over the last ten years are reaping rewards in terms of increased efficiency and industry awareness of the issues. However, consumer awareness has some catching up to do - particularly in relation to the creation of market pull demand for energy efficient products.

Market transformation of energy efficiency through branding holds promise as a way to influence parts of the market not yet reached through traditional energy efficiency marketing. Such marketing and communication is obviously not THE answer - but it could, and should, form an important part of the Market Transformation toolkit.