

LIGHTING IN A BOTTLE: EXPLORING RESIDENTIAL LIGHTING MARKETS

Moderator: Matthew Nelson, Eversource Energy

PAPERS *(in order of appearance)*:

What's the Point (of Sale)? Program Activity Impacts Efficient Bulb Sales—Proof Across 44 States and Five Years

Chris Russell, NMR Group Inc., Bryan, TX
Mike Strom, NMR Group Inc., Boston, MA
Scott Dimetrosky, Apex Analytics, Boulder, CO
Noah Leib, Apex Analytics, Boulder, CO

More Bulb for the Buck? Verifying Ratepayer Value in an Upstream Lighting Program

Natalie E. R. Bodington, Cadmus, Boulder, CO
Eric H. Rambo, Ph.D., Cadmus, Madison, WI
Bryan K. Ward, Madison, WI

We Know What You Did Last Summer: Revelations of a Lighting Panel Study

David Barclay, NMR Group, Inc., Jacksonville Beach, FL
Scott Walker, NMR Group, Inc., Somerville, MA
Kiersten von Trapp, NMR Group, Inc., Somerville, MA
Lisa Wilson-Wright, NMR Group, Inc., Somerville, MA
Matt Nelson, Eversource Energy, Boston, MA

SESSION SUMMARY:

This session will focus on three different methodologies to isolate the rapidly changing residential lighting market. All three presenters in this session will discuss innovated evaluation techniques to improve the way we look at the lighting market. The session will begin with Chris Russell from NMR guiding us through the findings of macro level data and lighting trends with actual sales level retail lighting data. Next Natalie Bodington of Cadmus will look at a lighting programs impact on price by comparing the two demographically similar areas with and without a program, at the retail level. Finally, David Barclay will take the conversation to a micro level multi-year panel study to reveal changing consumer habits over time with the phase in of EISA.

The goal of the Point of Sales research is to understand the influence of various predictors on the sales of efficient bulb types across the nation while federal legislation is actively phasing out less efficient bulb types—especially the impact of program activity. The findings of this study argue that the lighting programs remain to have an impact in promoting efficiently lighting over and above areas with no program activities. The modeling also reveals that more simplistic approaches to understanding the lighting market, considering only factors such as bulb pricing trends or the number of efficient bulbs sold, often fall short of being able to explain or account for the many interceding dynamics in the market.

The next presentation on verifying pricing in the upstream lighting program and will investigate a similar issue looking at the programmatic impact of upstream dollars on the end retail price. The methodology in this presentation will look at various retailers down to matching lighting products and observed retail prices. The study also compared these prices to the original program contract pricing form to compare the differences between the contract and shelf price. The results of this expected to find the observed retail prices of program states would be lower than that of the non-program state, however many

variation in prices were observed and the presentation will offer further detail and explanation into the variations in the observed retail prices in both the program and non-program state.

Finally the last presentation will look at a Multi-Year Lighting panel study. On the surface, this does not appear to be groundbreaking research—after all, lighting panel studies have been attempted before. However, designing a panel visit for multiple years allows for consistent protocols, and revisiting households makes it possible to directly monitor changes in specific sockets over time. Thus this study can provide greater insight into the question of what types of bulbs customers choose to replace bulbs that burn out or are otherwise removed. The results of this study will help answer the following questions: What are households using to replace incandescent bulbs? How many CFLs are used to replace other CFLs? What type of bulbs are LEDs replacing? What are households doing with all those bulbs they have in storage? When a bulb burns out, how do customers decide what bulb to use to replace it?