

The Lights They Are A'Changing: Early Results from EISA 2007

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May 17, 2012

Overview

- Background on EISA
- Reactions to EISA
 - Manufacturers
 - Retailers
 - Consumers
- What are we learning from these results?
 - Marketing and outreach recommendations

Background on EISA

- What EISA Is....
 - Requires general service lamps to be about 30% more efficient
 - Phase-in over 3 years
 - 2012: 100w → 72w
 - 2013: 75w → 53w
 - 2014: 60w → 43w
 - Adopted earlier in California

Misconception #1

- What EISA is NOT...
- Misconception #1:
 - EISA bans incandescents, requires CFLs
- Reality:
 - Law is technology neutral, does not require CFLs

Misconception #2

- Misconception #2
 - Current incandescents are illegal after January 1st of each phase-in year
- Reality:
 - Law pertains to manufacturing, not sales
 - Retailers can sell through existing stock

Misconception #3

- Misconception #3
 - All light bulbs are included
- Reality:
 - Law includes a number of exemptions, including three-way bulbs, candelabras, and appliance lights
 - Reflectors have their own standards

Misconception #4

- Misconception #4
 - Congress overturned EISA at the end of 2011
- Reality:
 - Only eliminated funds for enforcement
 - Law still stands

Misconception #5

- EISA means the end of the EZ Bake Oven
- Reality:
 - EZ Bake is alive and well!

NBC News: Hasbro's classic 50-year-old Easy-Bake oven is losing its light bulb in its 11th re-design. The new, bigger, sleeker purple Easy-Bake Ultimate Oven costs \$49.99, up from \$29.99



Early Results Based on Recent Studies

Primary Study Sponsor & State	Year Conducted	Manufacturer Interviews	Retailer Interviews	Consumer Interviews	Other Relevant Activities
NEAA, OR, WA, MT, ID	2009-2010	NA	NA	500	NA
Consortium Massachusetts	2010	11	190*	503	NA
PacifiCorp Wyoming	2011	NA	23	254	NA
PacifiCorp Washington	2011	NA	12	251	NA
PacifiCorp California	2011	NA	7	250	NA
Apex Analytics CA	2012	NA	NA	NA	Telephone Mystery Shopping (n=105)
Total		11	262	2,656	NA

Manufacturer Perspective

- Manufacturers are firmly behind the legislation

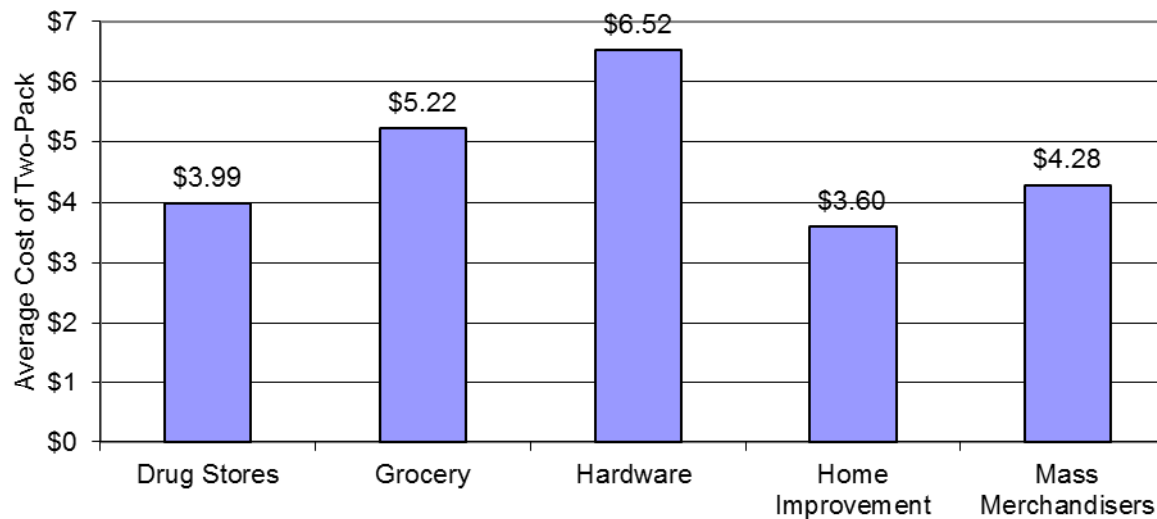
“NEMA remains committed to and supportive of the lighting standards...NEMA did not support the inclusion of this rider...American manufacturers have invested millions of dollars in transitioning to energy efficient lighting...Delay in enforcement undermines those investments...”

Manufacturer Products

- Many EISA compliant bulbs already available
- Most use halogen technologies

Manufacturer Products

- Bulbs cost more than legacy incandescents
- 72w bulbs close to price of CFLs



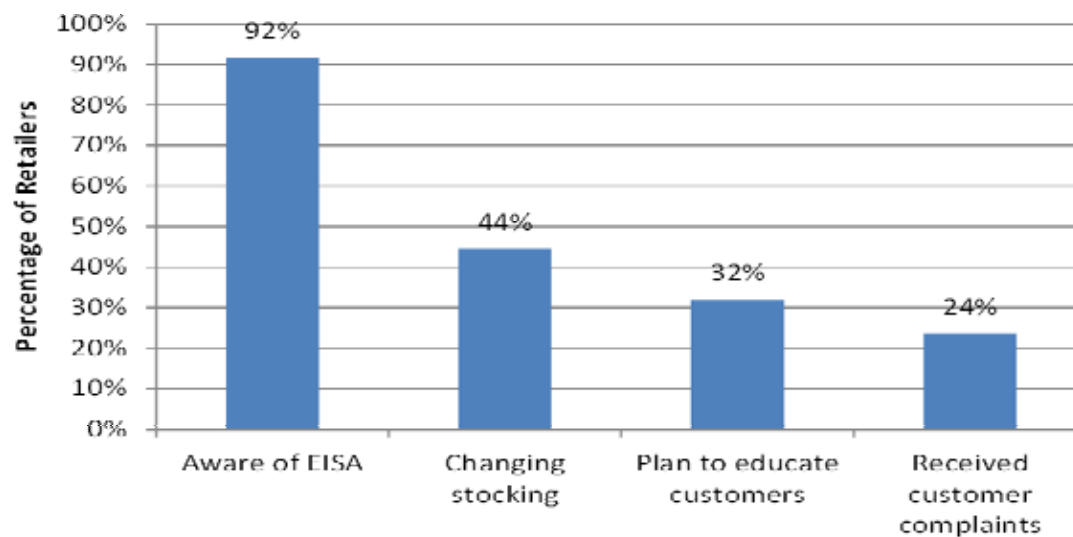
Source: Apex Analytics February-March 2012 California Telephone Mystery Shopping (n=50 retailers that carry 72w bulbs)

Retailer Awareness

- 2010 MA study: Only 48% of retail store managers aware of EISA
- 2011 PacifiCorp studies: 92% of store managers aware

Retailer Plans

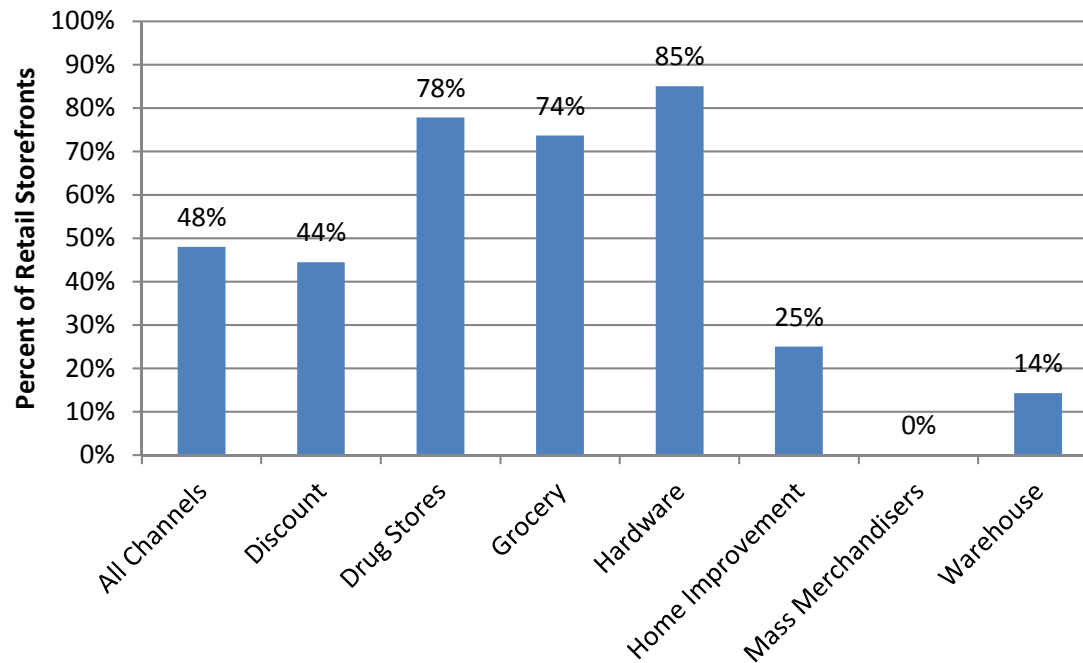
- Few retailers are already changing stocking or plan to educate customers
- Nearly one in four had received customer complaints



Source: PacifiCorp Residential Lighting Program Evaluations

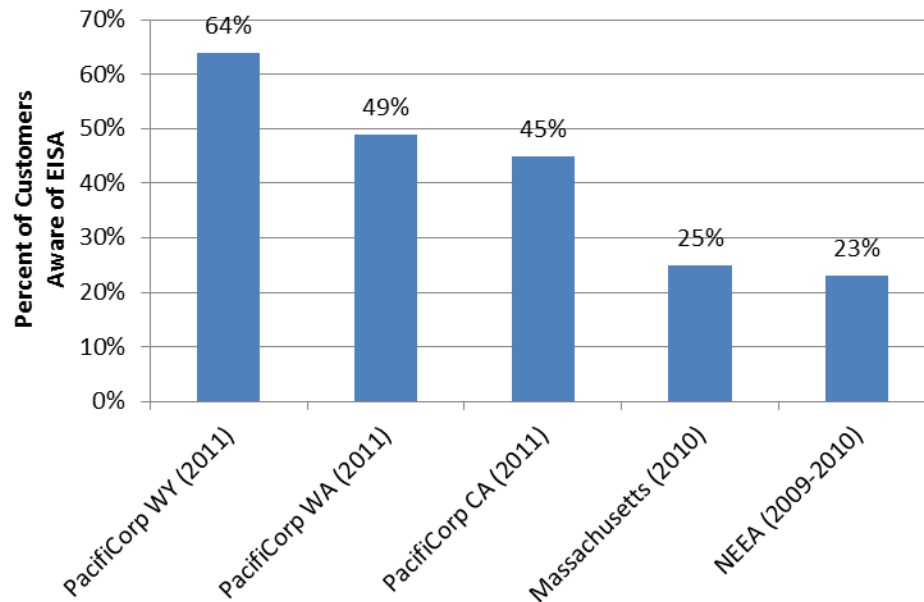
CFL Availability

- Almost half of all CA stores contacted in early 2012 still reported having 100w bulbs



Consumer Awareness

- Consumer awareness appears to be increasing
- Highest in Wyoming – negative...?



Consumer Stockpiling

- Mostly anecdotal
- Forthcoming study:
 - 45% of respondents will purchase extra 100w bulbs due to EISA
 - Includes respondents that were not previously aware of EISA

Summary and Conclusions

- **Manufacturers:**
 - Committed to EISA
 - Introducing new products
- **Retailers**
 - Becoming more and more aware
 - Many still have no plans to educate customers
 - In CA many continue to carry legacy bulbs

Summary and Conclusions

- Consumers
 - Many are still “in the dark”
 - Indications that as consumers learn there is a negative reaction

Summary and Conclusions

- **URGENT NEED FOR MORE CONSUMER EDUCATION**
 - Facts about the law
 - Product options
 - Role for utility programs
- Risk if we don't educate consumers
 - “Spin” by those opposed to EISA
 - Misconceptions can influence public opinion

Questions?

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Orlando, FL

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