RESIDENTIAL LIGHTING

MARKET STUDY

TRENDS, SAVINGS, AND OPPORTUNITIES

Bonneville POWER ADMINISTRATION

May 2017

With data provided by

neea

LIGHTING IS …

3rd Largest Residential End-Use

6% of Total Regional Consumption

1/4+ of Residential Program Savings

AND CHANGING QUICKLY

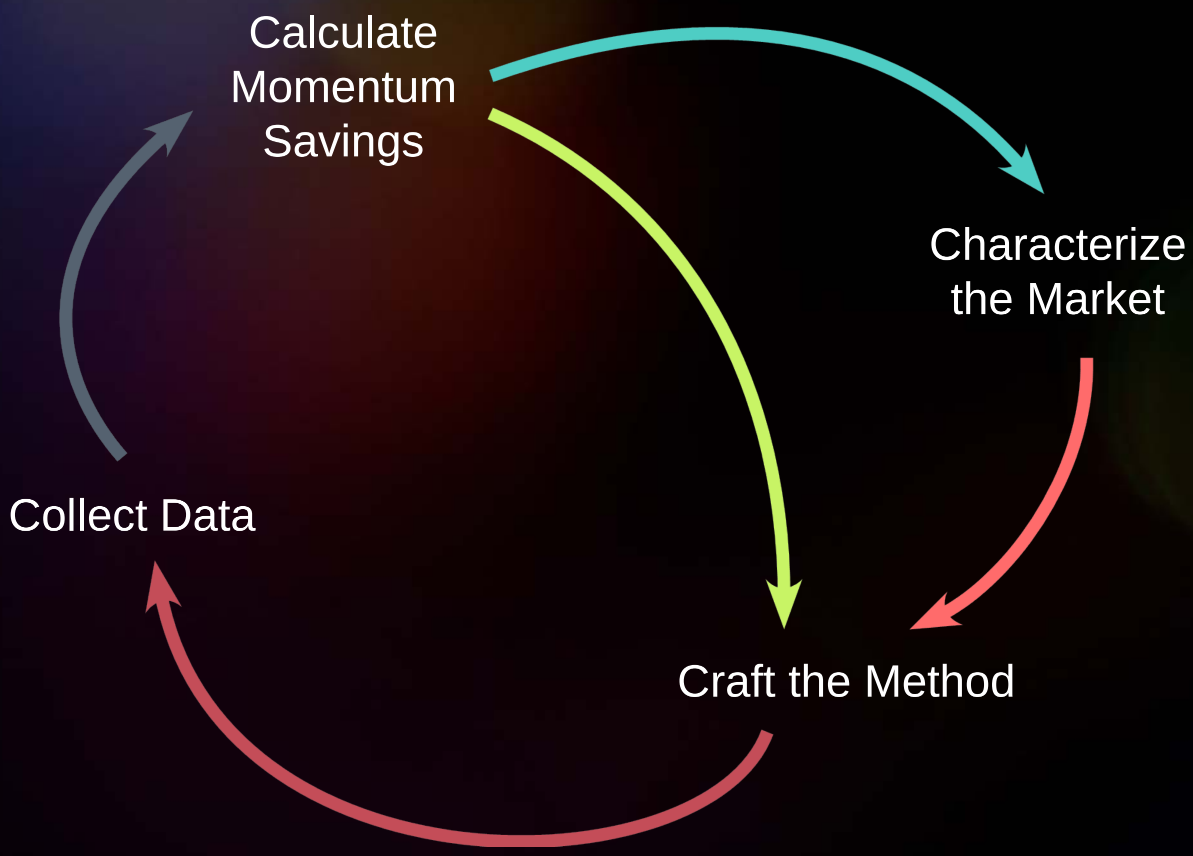
More abundant and cheaper LEDs

Federal regulations

New market actors and channels

Divestment in CFLs

WHY WE TRACK MARKETS



HOW WE KEEP UP

- Literature Review
- Interviews
- Analysis
- Modeling

LITERATURE REVIEW

RBSA

Evaluations & Program Reports

Sixth & Seventh Plan

Local Program Data

Industry Research & Press Releases

INTERVIEWS

ON THE PHONE

14 Lighting Showrooms

10 RNC Builders

3 Online Retailers

AT ENERGY STAR PARTNER MEETING

10+ Retailers and Manufacturers

AT LIGHTFAIR

20+ Lamp, Fixture, and Controls Manufacturers


ANALYSIS
NIELSEN
SALES DATA
NEEA
SHELF SURVEYS
ONLINE
SALES DATA

We used the

CHAIN LOGIC METHOD

to develop representative market averages.

MODELING

Every Lamp Sold
(66 million)

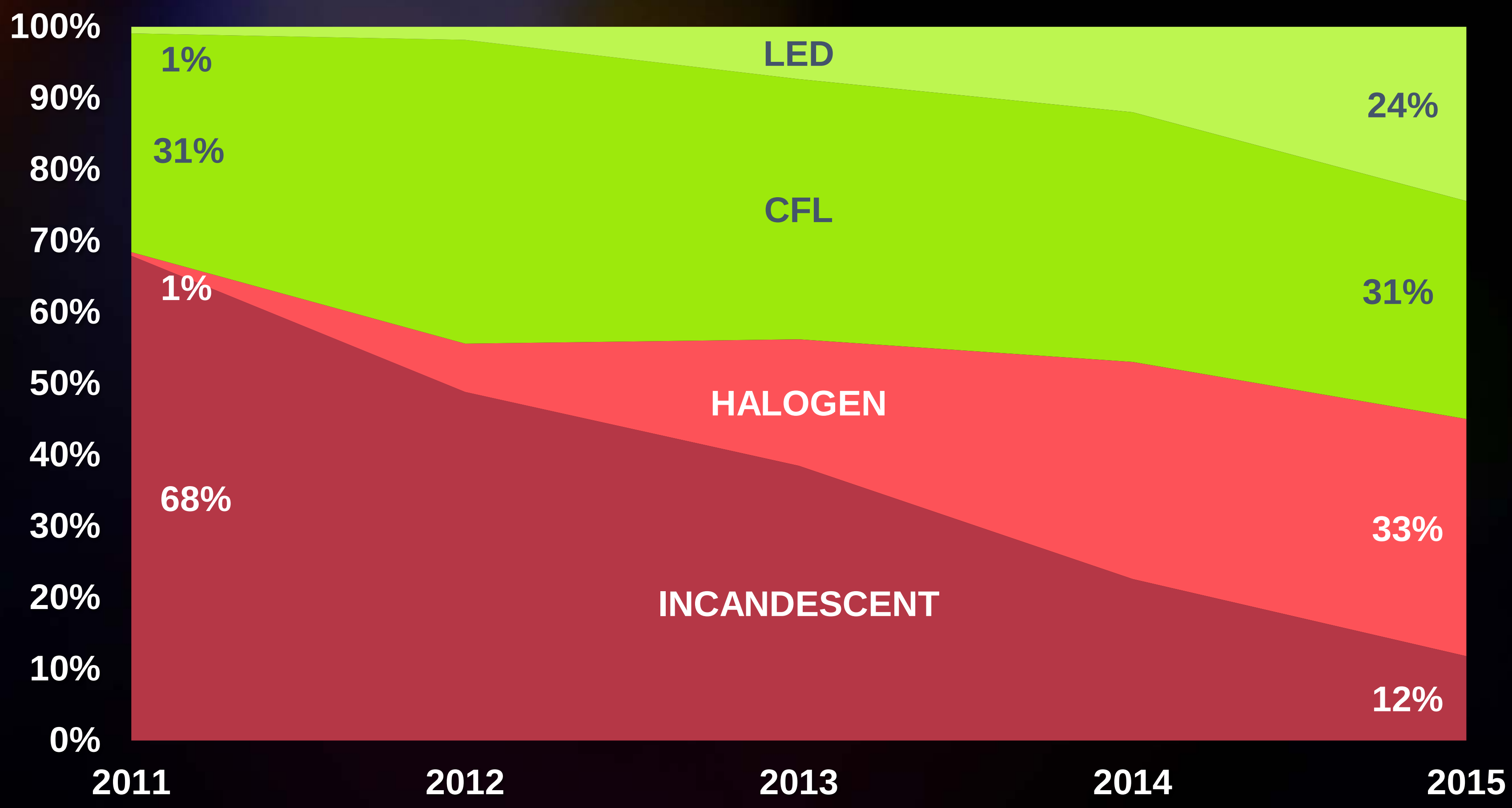
Every Socket
(300 million)

Every Home
(5.6 million)

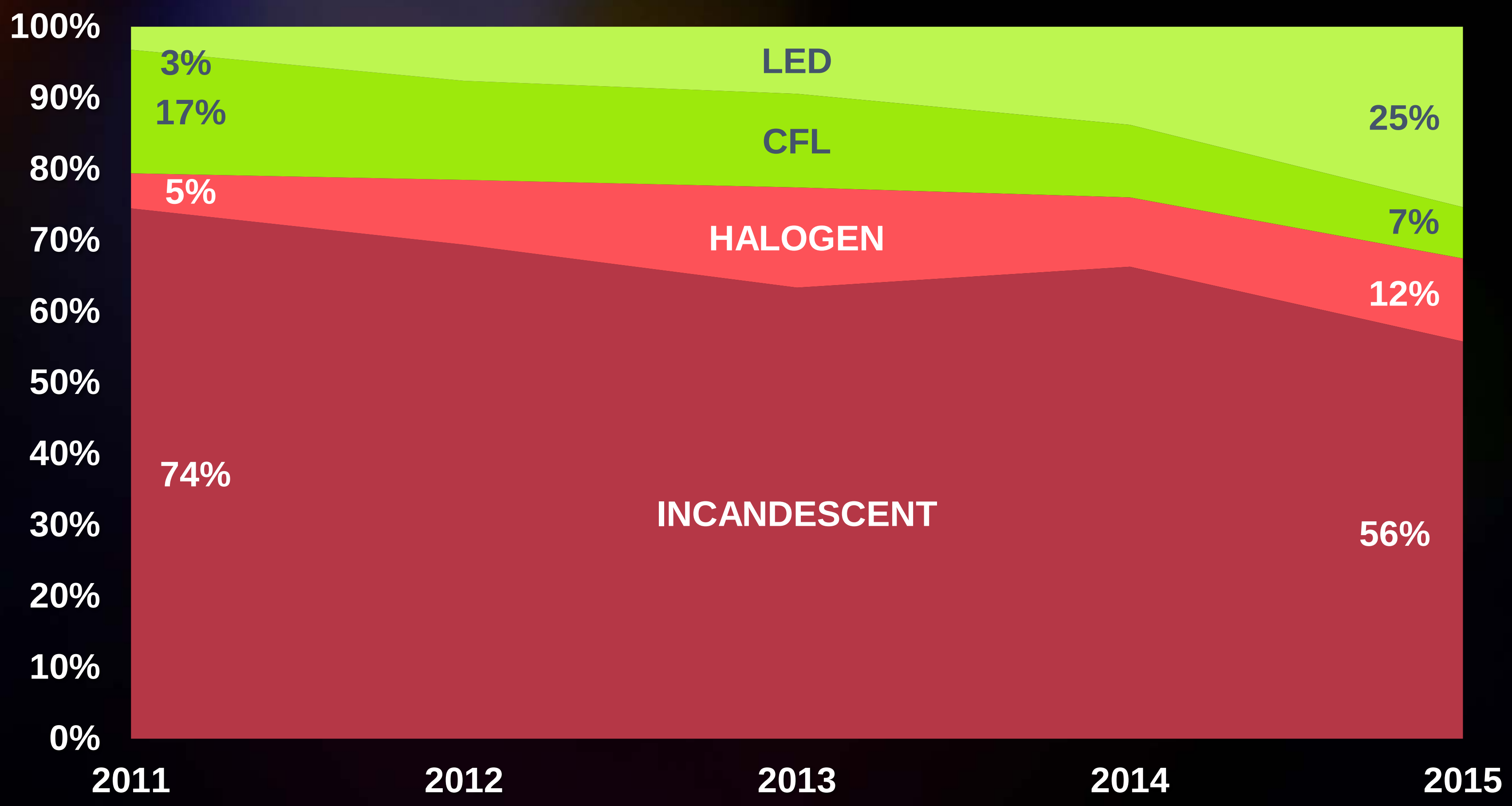
MODELING

WHAT DID WE LEARN?

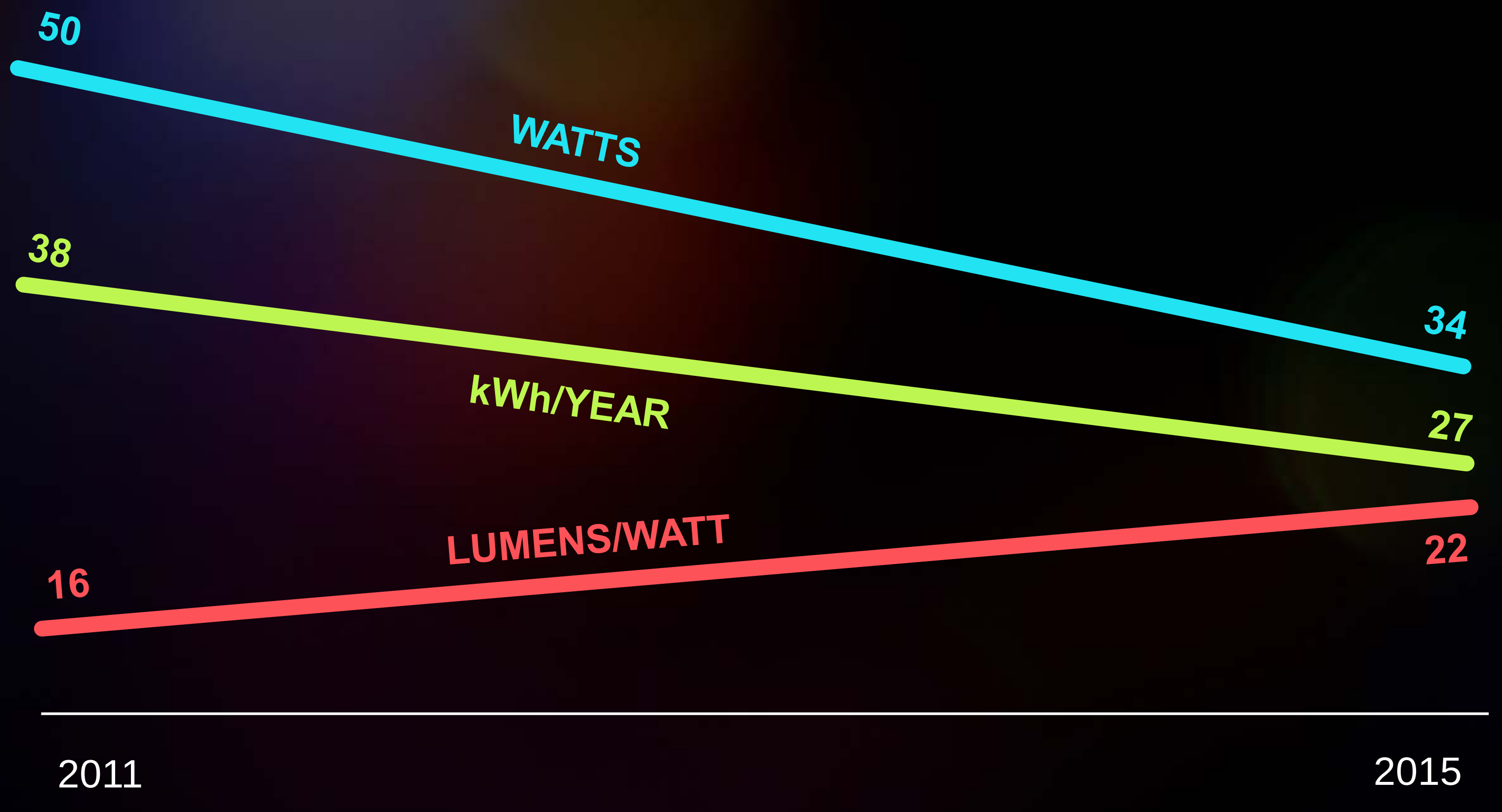
GENERAL SERVICE LAMPS



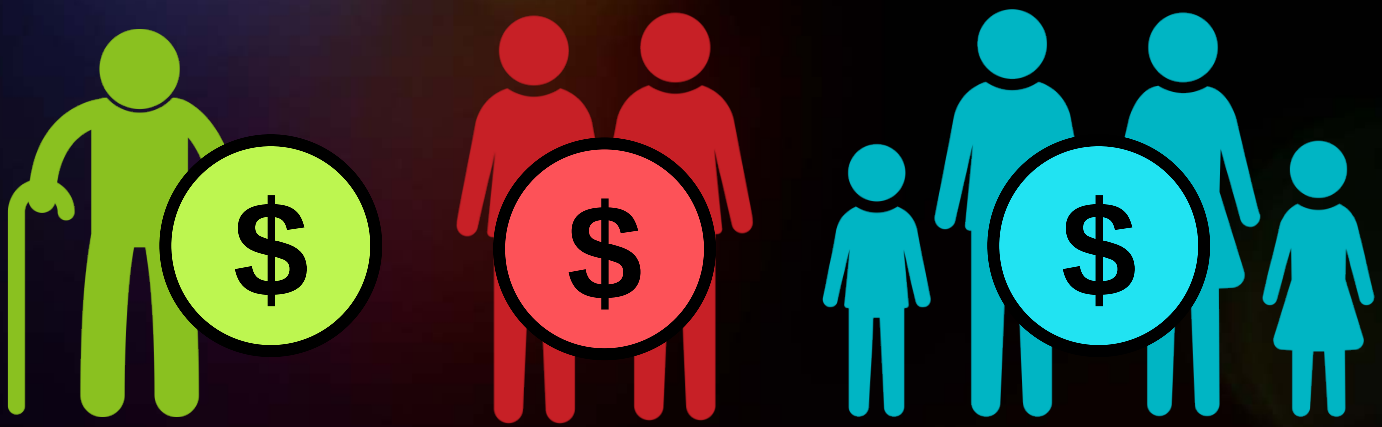
SPECIALTY LAMPS



LESS ANNUAL CONSUMPTION

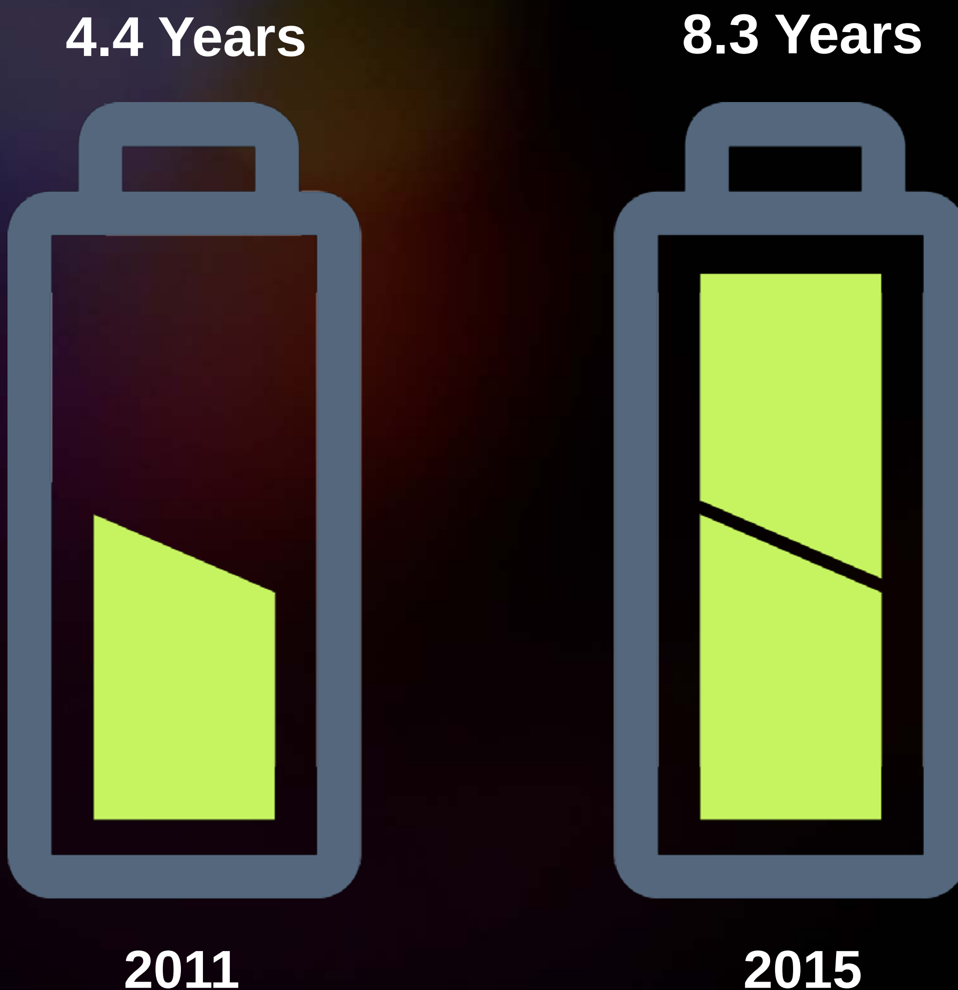


MEANINGFUL DIFFERENCE

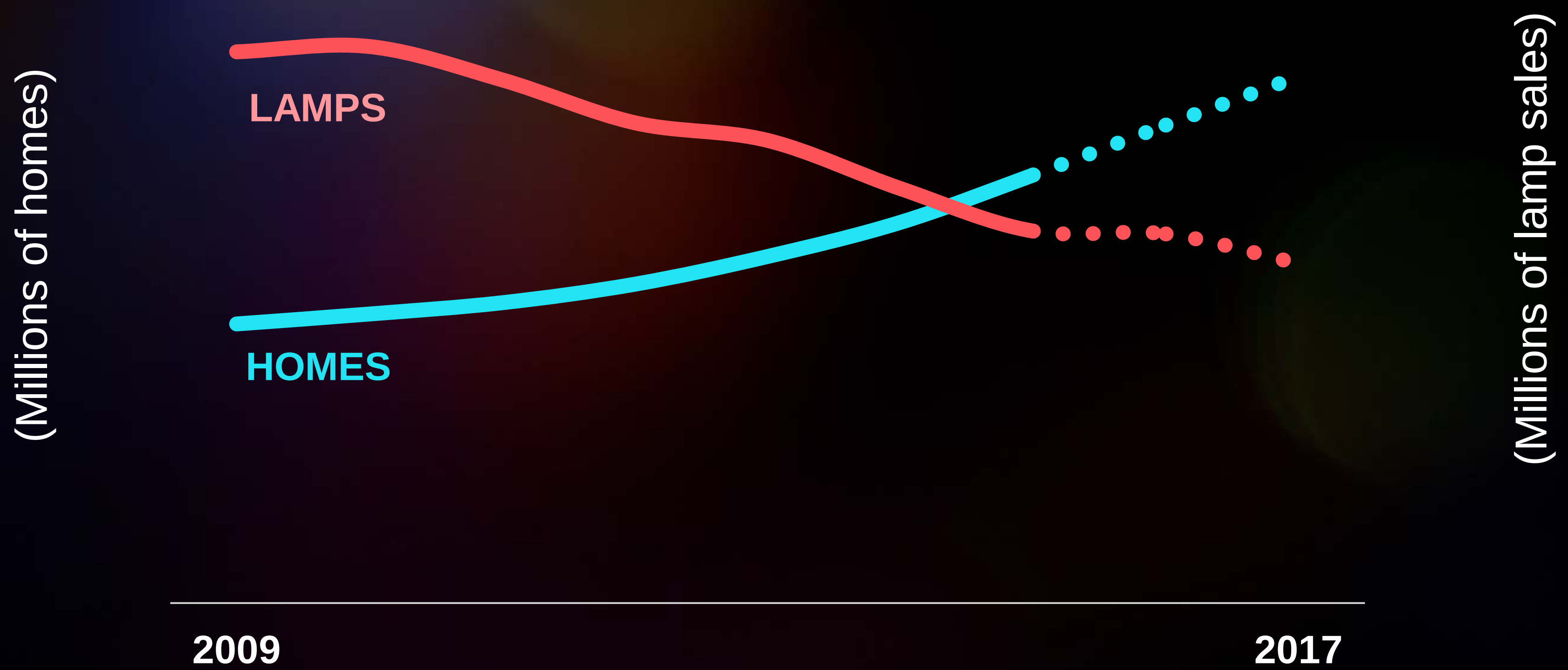


$52 Annual Savings per Customer

THE AVERAGE LAMP ALSO LASTS TWICE AS LONG

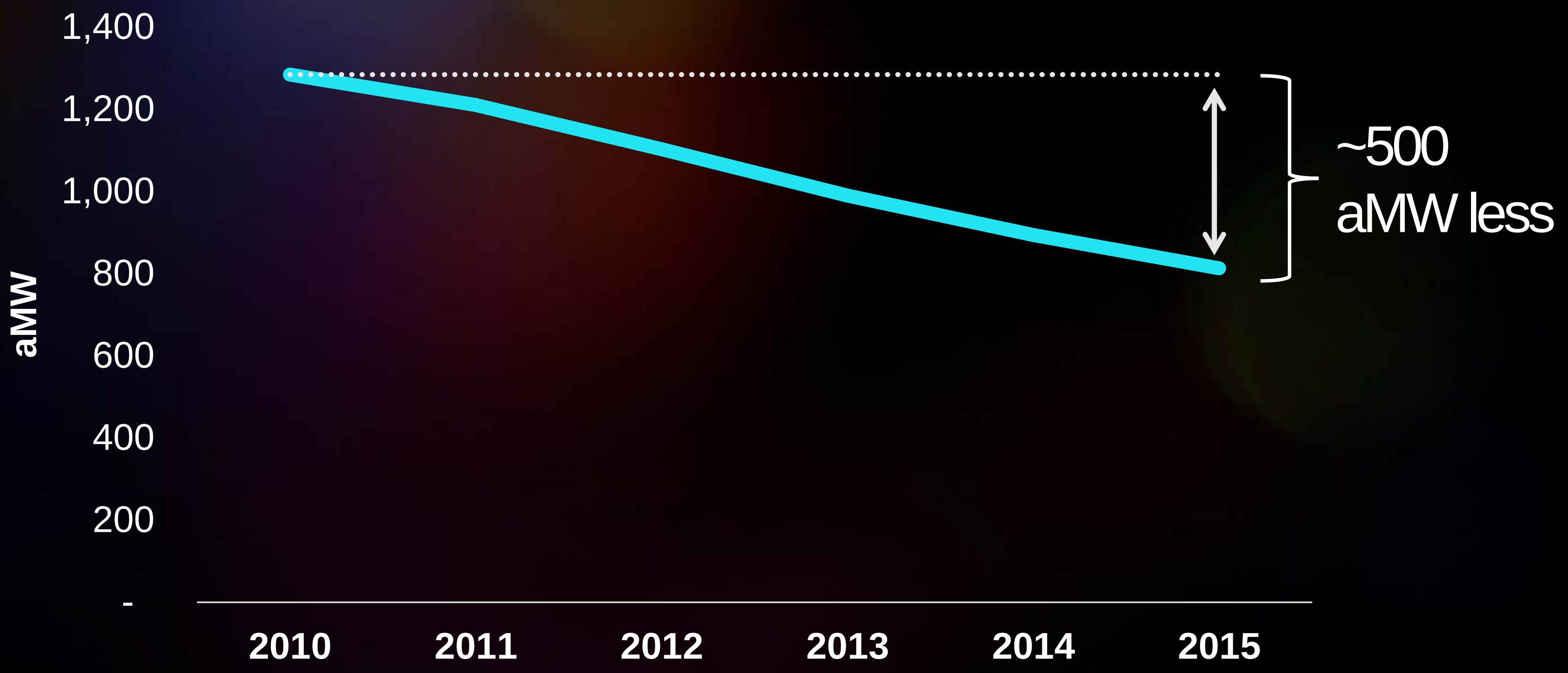


LONGER LIFE = FEWER SALES




TOTAL
MARKET
SAVINGS

Total residential lighting energy consumption has fallen by over a third.



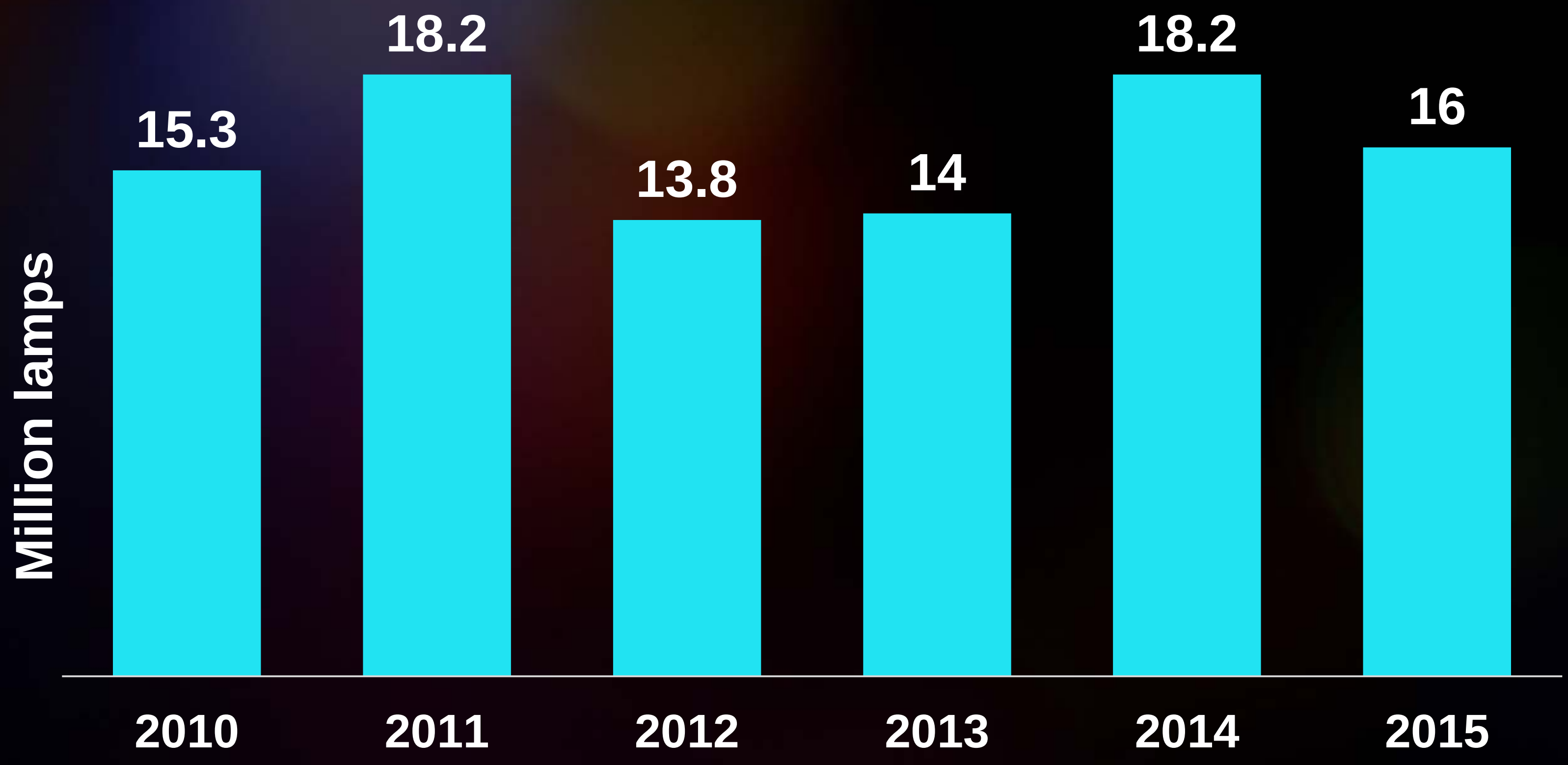
THAT'S THE EQUIVALENT OF...

330,000 HOMES

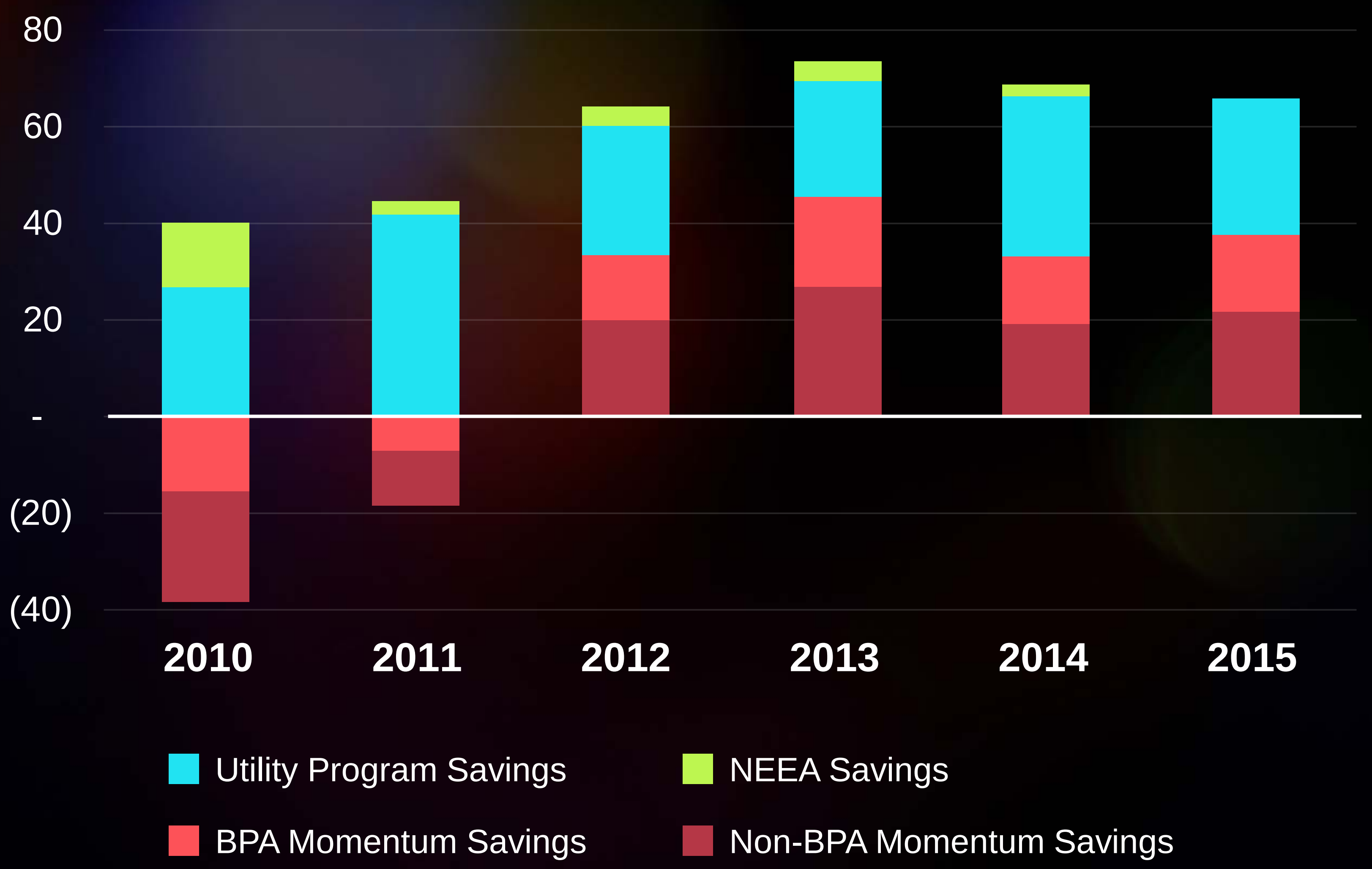
EVERY DRYER
IN THE NW

THE HUNGRY
HORSE DAM

PROGRAM ACTIVITY

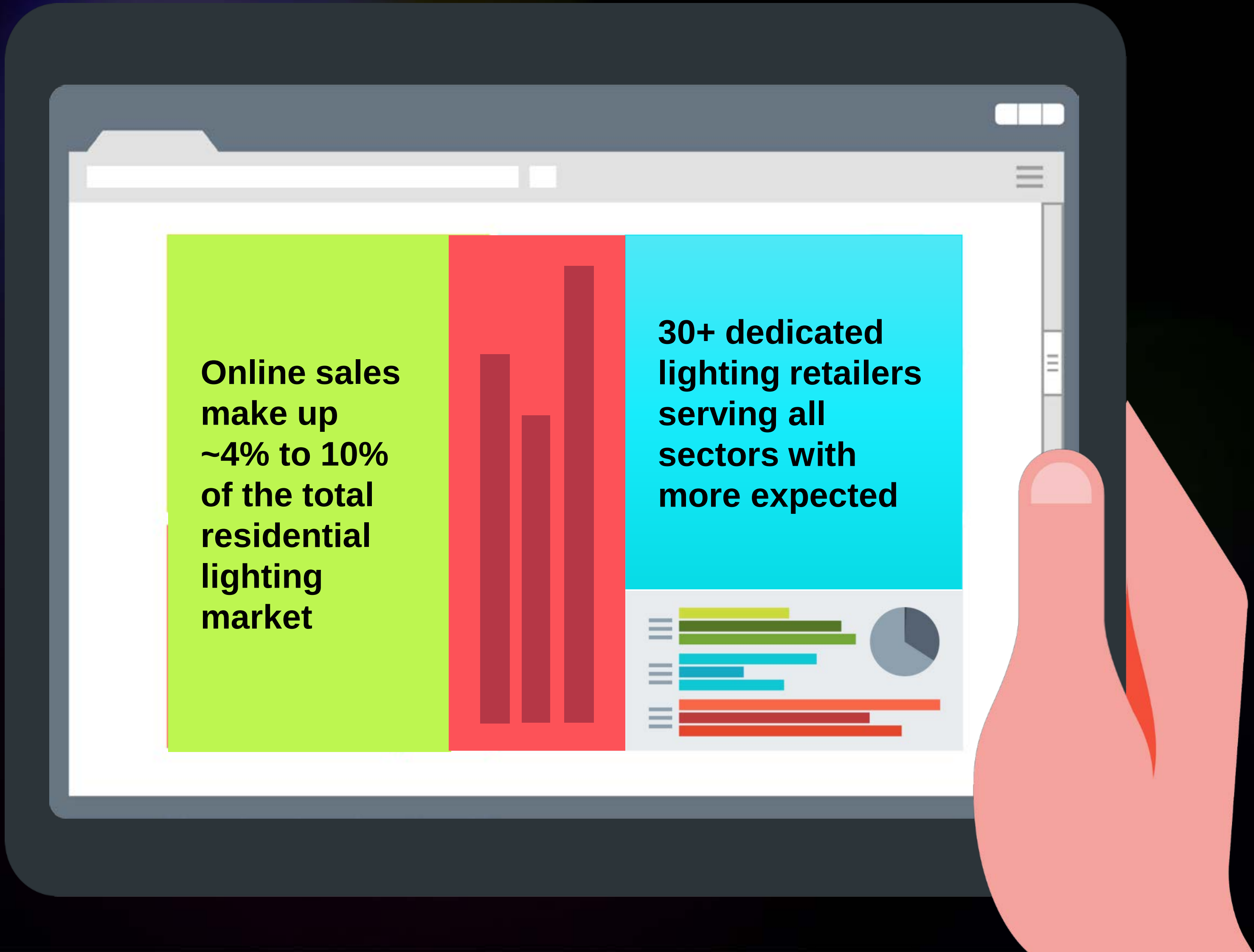


MOMENTUM SAVINGS



ONLINE RETAILERS

RAPID GROWTH



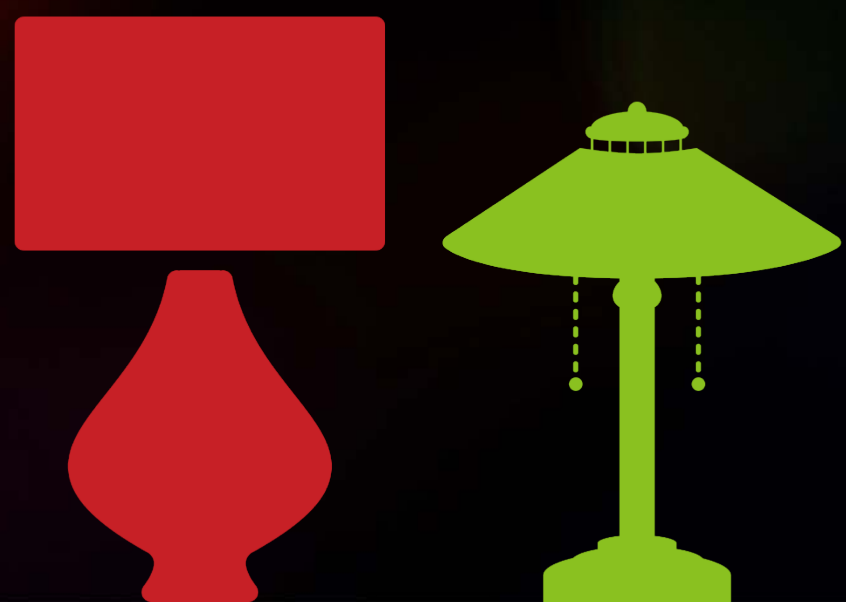
SELL FEWER ENERGY STAR LAMPS

OPPORTUNITIES TO REACH RURAL CUSTOMERS


LIGHTING
SHOWROOMS


RESIDENTIAL
NON-RESIDENTIAL
LIGHTING SHOWROOMS
SERVE BOTH SECTORS

FIXTURES AND SPECIALTY LAMPS




NEW
CONSTRUCTION

HOW DO BUILDERS CHOOSE THEIR LIGHTING?

COST

CODE

AESTHETICS

SUSTAINABILITY PRACTICES

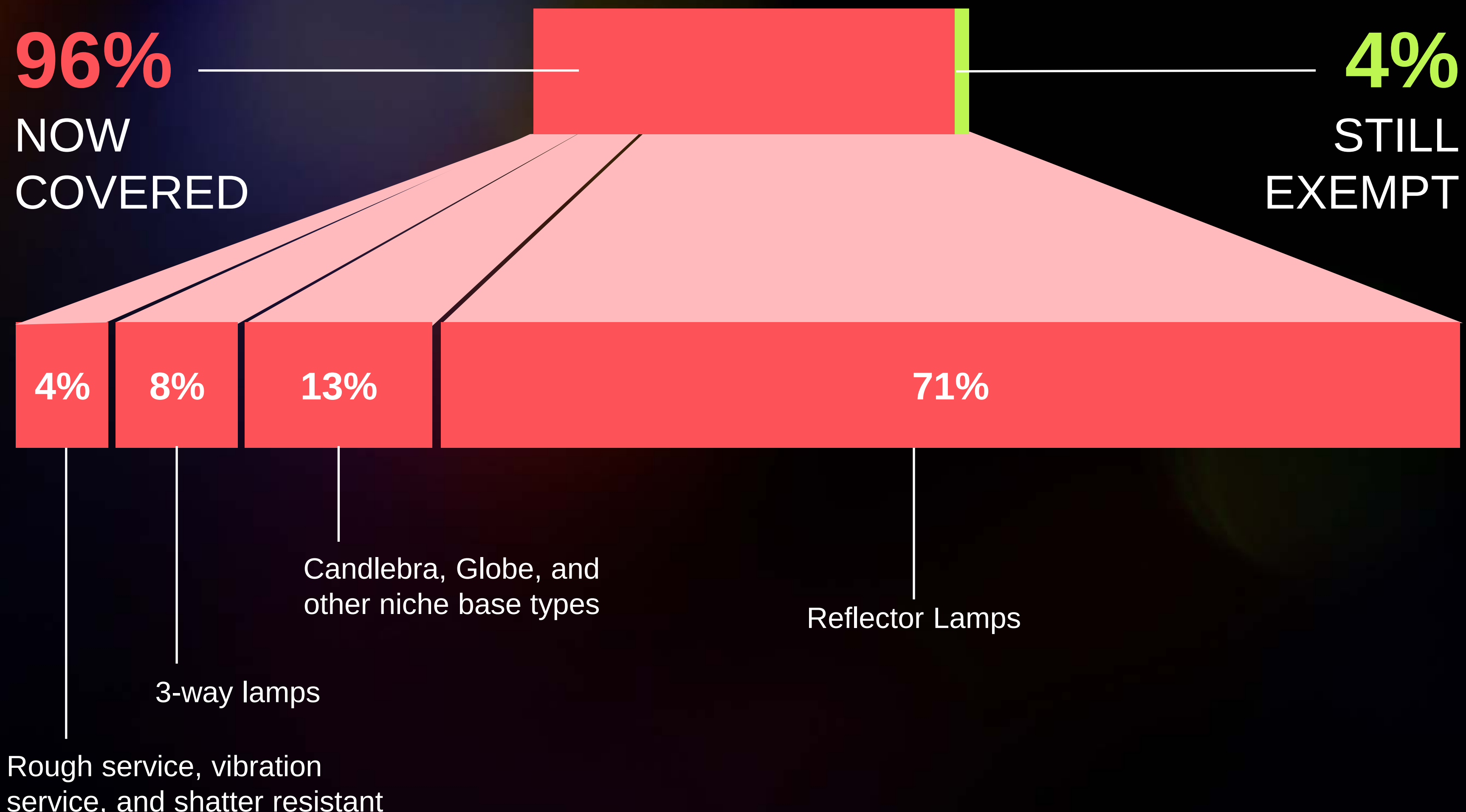

Builder
Electrician
WHO
DETERMINES
SPECS?
Showroom


WHAT'S
NEXT?

EISA 2020...MAYBE

45 LUMENS PER WATT

EXPANDED SCOPE



KEY TAKEAWAYS

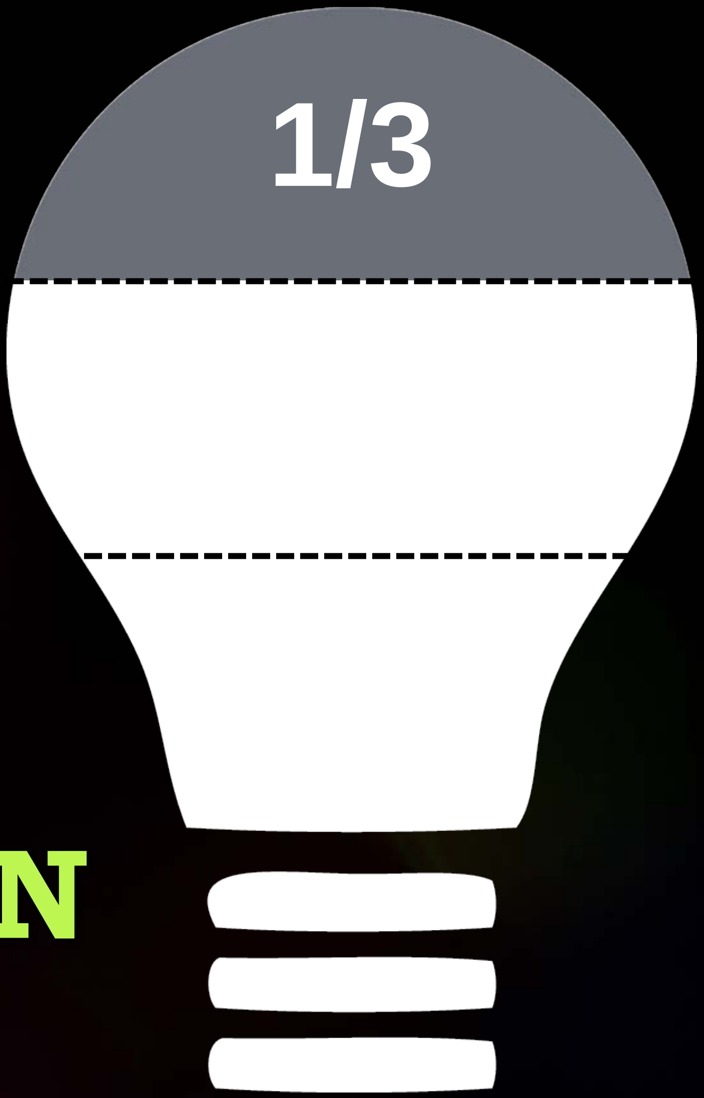
Consumers are buying

MORE EFFICIENT LAMPS.

Total residential lighting

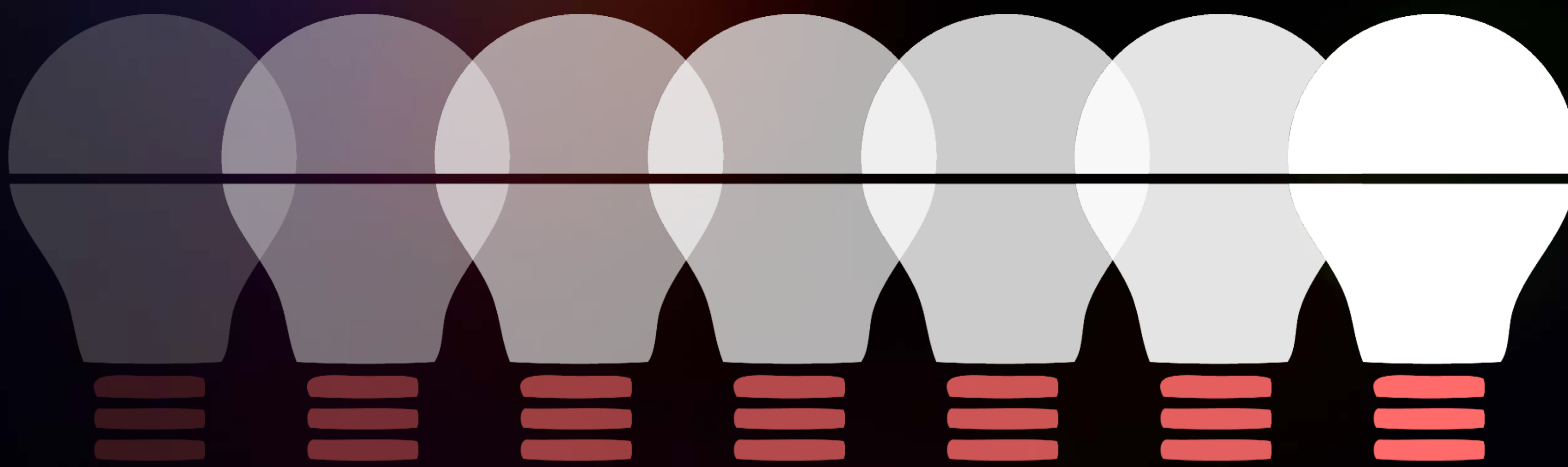
ENERGY CONSUMPTION HAS FALLEN

by more than a third.



EISA 2020, if it stands, will drive even

greater efficiency gains.



The lighting model we developed is a

resource for the region.

simple steps smart savings™

PROGRAM PLANNING

MEASURE UPDATES

POWER PLANNING

BETTER DATA = BETTER MODELS.

Update model with…

NEEA's 2016-17 RBSA

NEEA's ongoing retail shelf-stocking

Market share reflecting emerging channels


COMMENTS OR QUESTIONS?
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May 2017
With data provided by
neea